

Maine Office of Tourism Visitor Tracking Research 2010 Annual Report

Prepared by



July 2011



Table of Contents

• Introduction and Methodology	6
• Baseline Visitor Statistics	13
— Overnight Visitor Market Share	
— Estimated Overnight and Day Visitation to Maine	
— Overall Overnight and Day Visitor Expenditures	
• Planning an Overnight Trip to Maine	20
— Trip Planning and Booking Timeframe	
— Trip Planning Sources	
— VisitMaine.com Usage & Satisfaction	
— Websites Used to Research Trip	
• Overnight Visitor Travel Logistics	27
— Other Destinations Considered	
— Travel Party Composition	
— Transportation & Accommodations	
— Maine Visitor Center Usage	
— Trip Research While in Maine	

Table of Contents

• Overnight Visitor Experience	35
— First-Time & Repeat Visitation	
— Reasons for Selecting Maine	
— Residence of Overnight Visitors	
— Primary Purpose of Trip to Maine	
— Trip Activities While in Maine	
— Trip Highlights & What Could Have Been Better	
— Comparison to Other Destinations & Descriptions of Maine	
 • Day Visitor Travel Logistics	 54
— Other Destinations Considered	
— Travel Party Composition	
— Transportation & Accommodations	
— Maine Visitor Center Usage	
— Trip Research While in Maine	

Table of Contents

• Day Visitor Experience	60
— First-Time & Repeat Visitation	
— Reasons for Selecting Maine	
— Residence of Overnight Visitors	
— Primary Purpose of Trip to Maine	
— Trip Activities While in Maine	
— Trip Highlights & What Could Have Been Better	
— Comparison to Other Destinations & Descriptions of Maine	
• Key Visitation Metrics	78
— Trip Spending	
— Likelihood to Recommend Maine as a Travel Destination	
— Likelihood to Travel to Maine in the Future	
• First Time versus Repeat Visitors	82
• Canadian Visitation	106

Table of Contents

•	Summary & Conclusions	127
•	Appendix: Regional Insights	130
—	Maine Beaches	
—	Greater Portland & Casco Bay	
—	Maine Lakes & Mountains	
—	Mid-Coast Maine	
—	Kennebec & Moose River Valleys	
—	The Maine Highlands	
—	Aroostook County	
—	Downeast & Acadia	
—	2009 & 2010 Sample Size Comparison	

Introduction and Methodology



Introduction

- The Maine Office of Tourism has commissioned DPA to conduct a visitor research program designed to provide information on tourism activity in Maine and explore the motivations of visitors.
- This research program is designed to:
 - Profile Maine visitors in demographic terms as well as in their travel patterns;
 - Explore perceptions of Maine among visitors;
 - Understand why some travelers choose to visit Maine;
 - Describe both seasonal and regional visitation patterns of Maine visitors;
 - Explore what Maine visitors like and dislike about the locations in Maine they have visited; and
 - Estimate levels of spending in Maine by residents and non-resident visitors.

Methodology

- The Maine Office of Tourism Visitor Research Program is conducted online, with survey participants recruited from the eRewards national online panel.
- Information is gathered using three main surveys on an ongoing basis:
 - **Regional Travel Survey**
 - Includes travelers living in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada;
 - Respondents are screened to see if they have taken an overnight trip to Maine in the past four weeks. If they have, they are asked to complete the Maine Overnight Visitors Survey.
 - **Maine Day Visitor Survey**
 - Includes travelers living within Maine or within a 100-mile radius of Maine's borders who have taken a day trip in Maine that is at least 50 miles from home within the past four weeks.
 - **National Omnibus Survey**
 - Includes a nationally balanced sample of US residents; and
 - Used to determine the incidence of travel nationwide and Maine's share of that travel.

Methodology

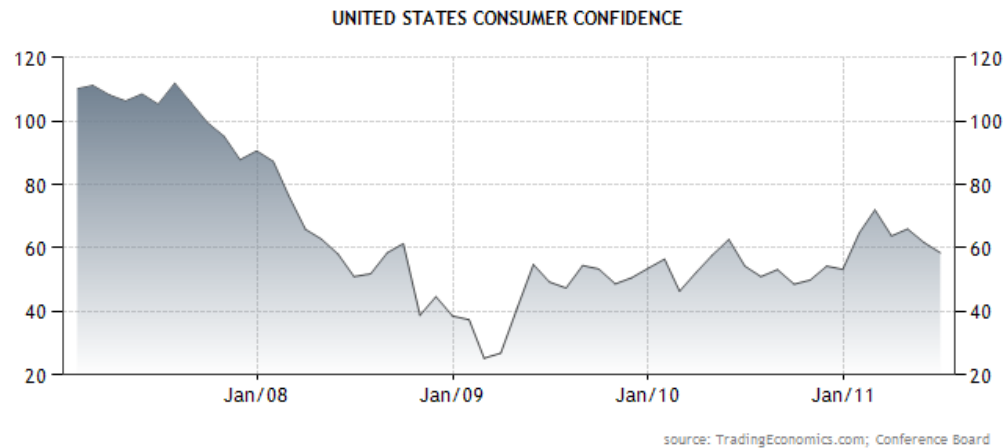
- This report outlines results from travel occurring between June 2010 and April 2011.
- Data was collected between June 30, 2010 and May 12, 2011. The number of completed surveys collected for each research component are as follows:
 - Maine Overnight Visitor Survey – 2,992
 - Maine Day Visitor – 1,796
 - National Omnibus Survey – 16,639
- Throughout this report, 2010 sample sizes are reported on each slide. Corresponding 2008 and 2009 sample sizes -- used to calculate year-over-year statistical significance, can be found in the Appendix of this report.
- Throughout this report, the acronym VFR stands for “visiting friends or relatives.”

2010 in Context: The Weather

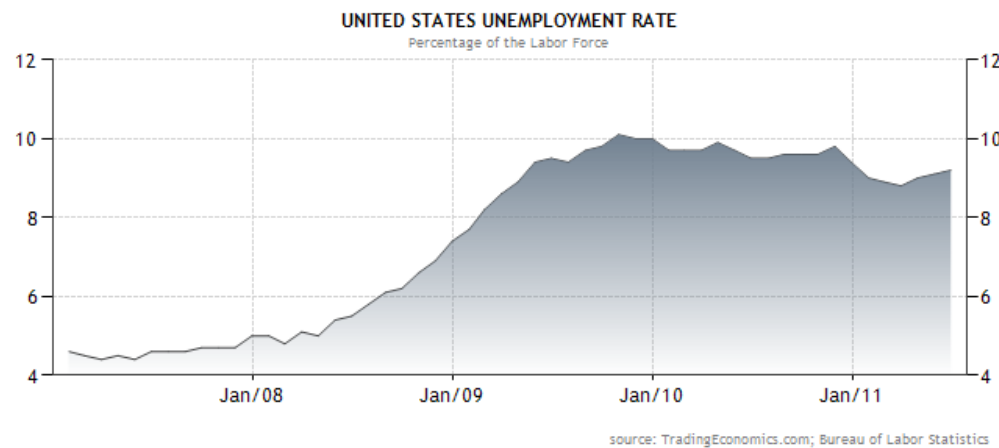
- The weather is a constant factor for Maine travel, and during the seasons analyzed in this report we experienced the following:
 - Summer:
 - “The summer of 2010 in Portland will be remembered for its record-tying heat. The average temperature for the summer was 68.7 degrees, which tied 1988 as the warmest summer on record at the Portland Jetport.”
 - “Last year, Summer 2009 was the wettest summer on record with 22.31 inches of rain. This year’s summer (2010) in Portland measured less than half that amount with just 10.48 inches of rain. Still the ten and a half inches of rain was above normal by nearly an inch.”
 - Fall:
 - Although the weather in fall 2010 was not vastly different from normal, it was a bit warmer than the historical average, and, particularly in October, there was a bit more rain than normal.
 - Winter:
 - The weather in winter 2010-2011 was not drastically different from long term norms in regard to both temperature and precipitation, but it was a particularly warm and wet April.

2010 in Context: The Economy

- **Consumer Confidence Index:** Consumer confidence in 2010 remained well below historical trends.

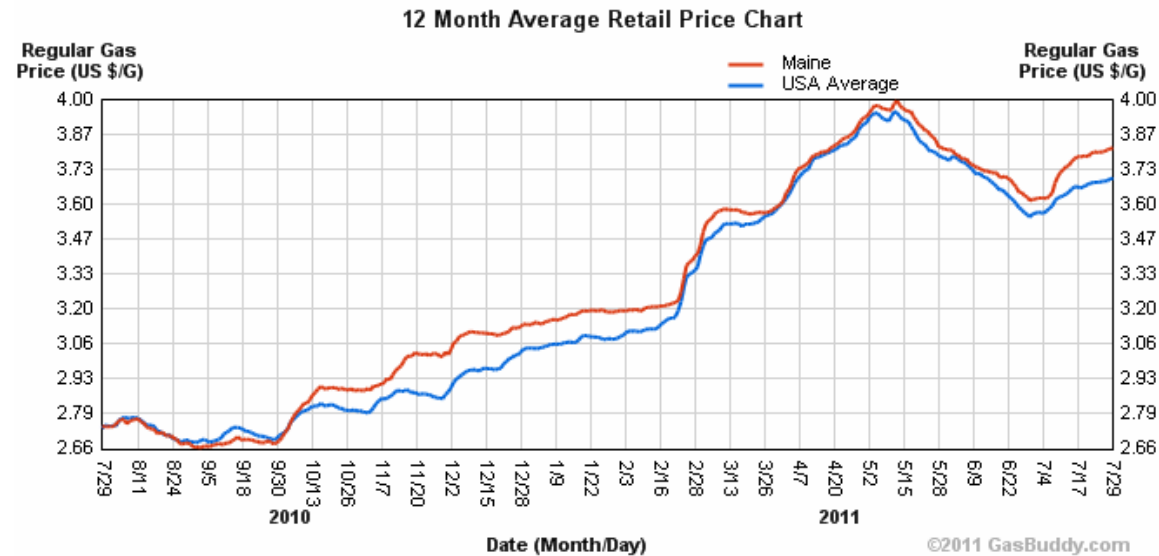


- **Unemployment:** The unemployment rate in 2010 remained high.

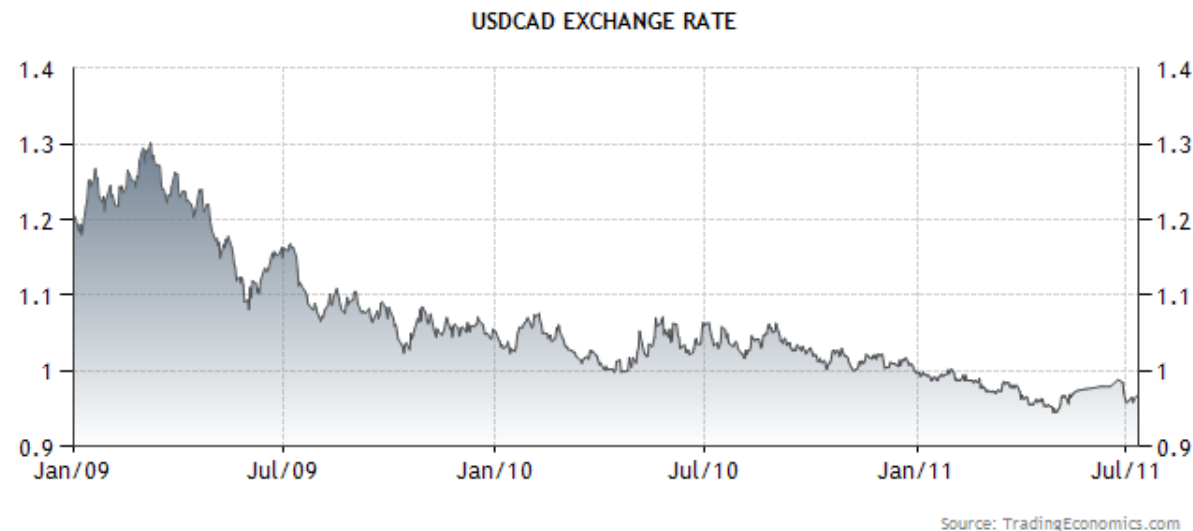


2010 in Context: The Economy

- Gas Prices: Gas prices steadily rose in 2010, and soared into the spring of 2011.



- Canadian Currency rate: While not as high as in 2009, the Canadian exchange rate weakened some in 2010, hovering just around unity.

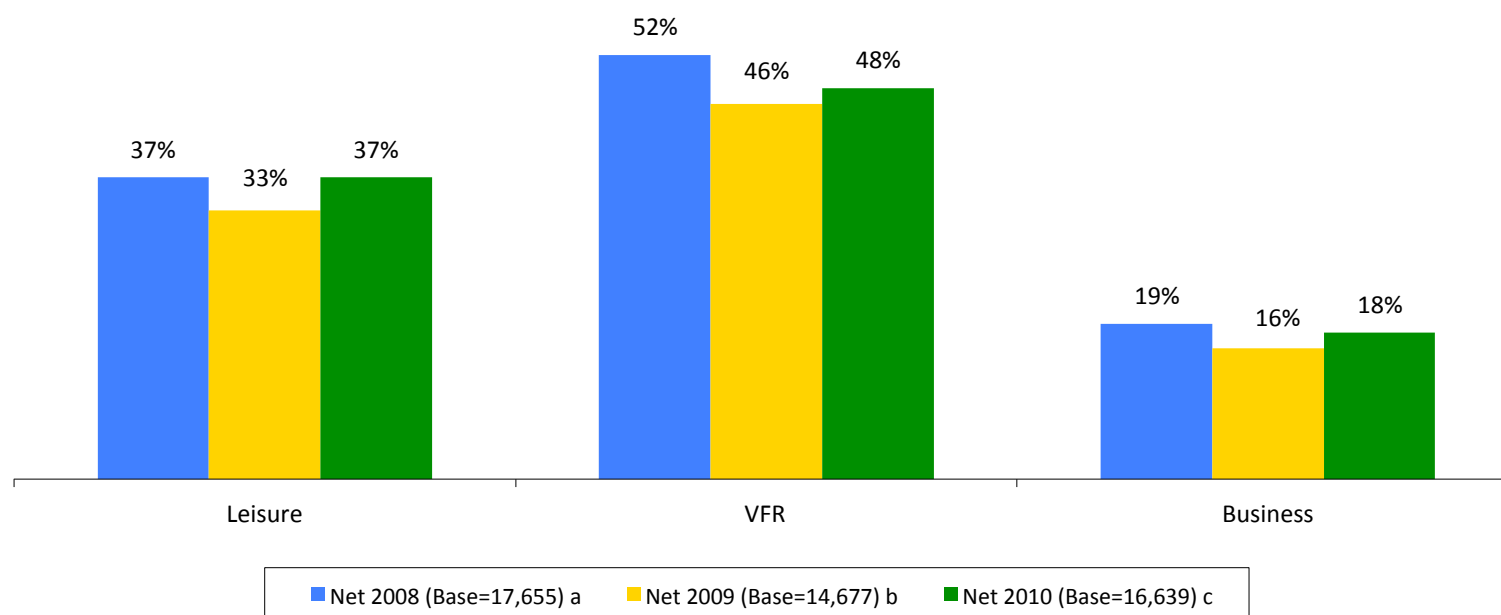


Baseline Visitor Statistics



Travel Among US Residents 2008-2010

- After a recessionary-backed decline in travel in 2009, 2010 saw the percentage of US residents who took an overnight trip rise back towards levels similar to those seen in 2008. This was particularly true in leisure travel, as pent-up demand drove a rebound in this market. Visiting friends and relatives travel is still down somewhat from pre-recessionary levels.



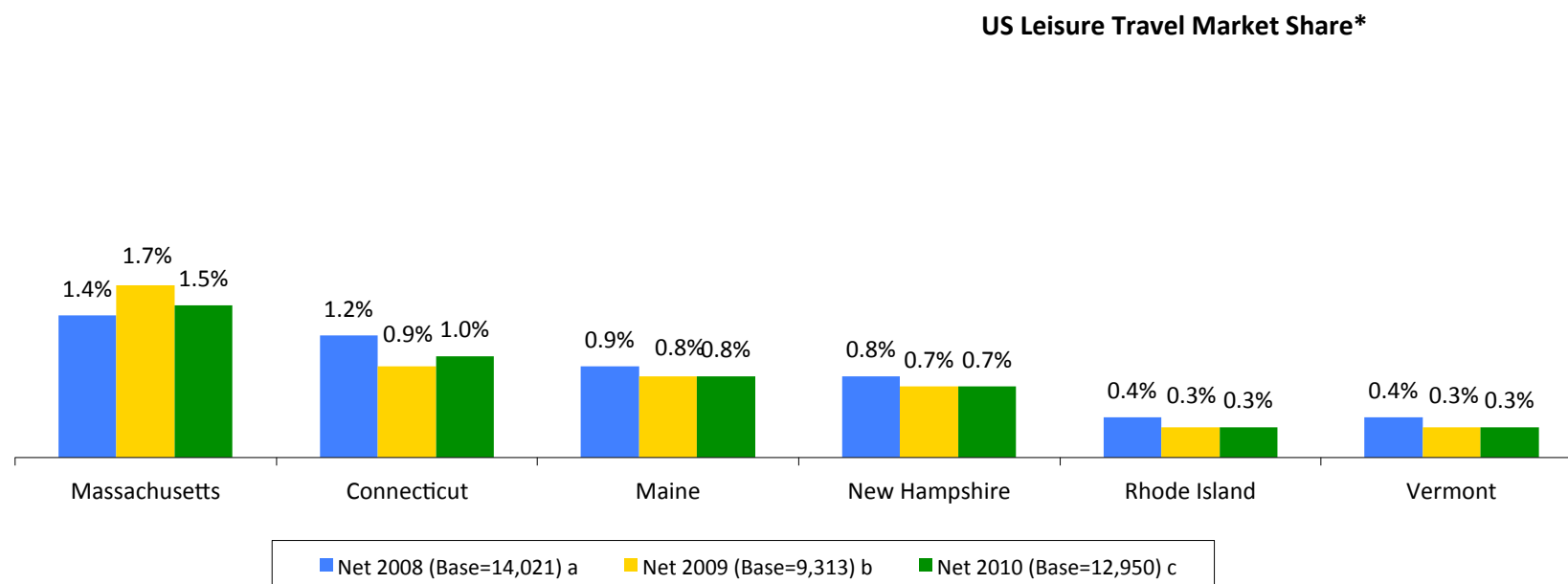
Nat'l Omnibus Q1. During the past four weeks, how many times have you taken a trip on which you spent at least one night away from home for either business, visiting friends/relatives, or leisure?

*2008 data was reweighted to represent the same year-over-year timeframe as 2009. As such, 2008 results may vary slightly from those published in the 2008 Annual Report.

↑↓ notes significant year-over-year difference at 95% confidence level

Maine Overnight Market Share Compared to New England – *Leisure Travel*

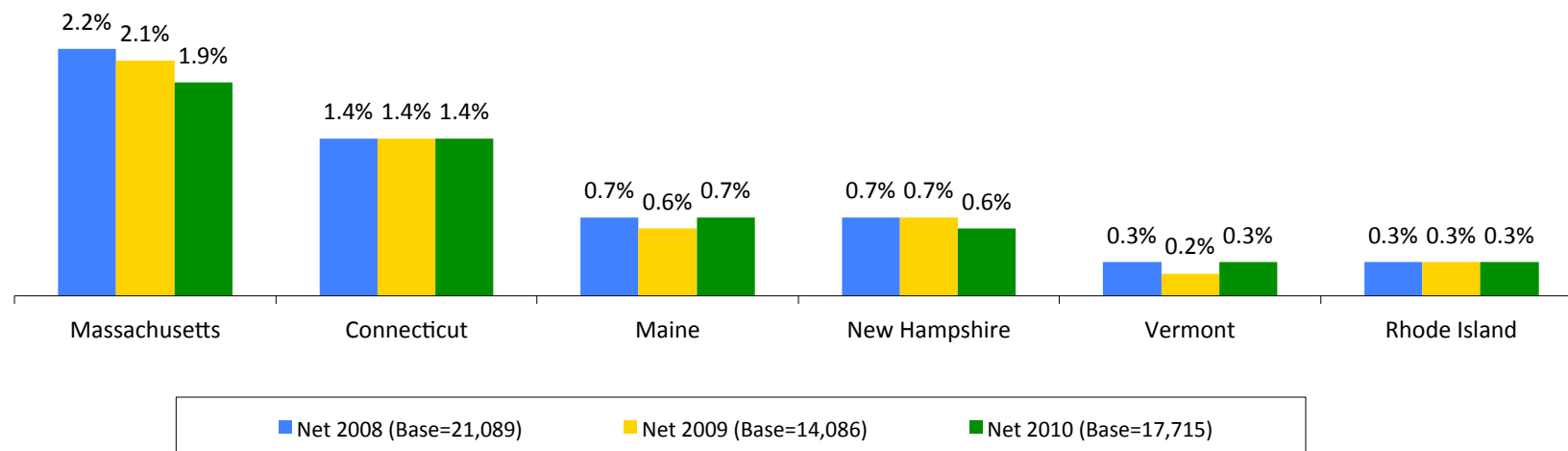
- While overall leisure travel is up, Maine's share of the leisure travel market in 2010 was statistically stable to prior years.



Maine's Overnight Market Share Compared to New England – VFR Travel

- As was the case with Maine's share of the US leisure travel market, the State experienced statistical stability in its share of US VFR travel in 2010 as compared to the same period in 2008 and 2009.

US Travel to Visit Friends/Relatives Market Share*



Nat'l Omnibus Q2_v. In which U.S. state, Canadian province, or other country was the primary destination of each of these trips? Share of total trips taken by U.S. residents.

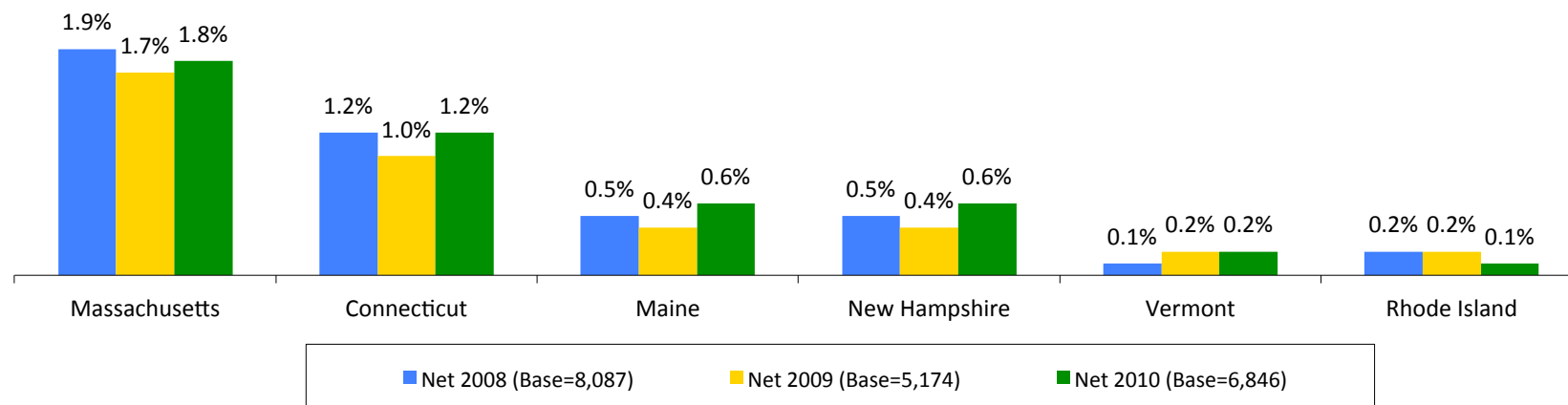
*2008 data was reweighted to represent the same year-over-year timeframe as 2009. As such, 2008 results may vary slightly from those published in the 2008 Annual Report.

↑↓ notes significant year-over-year difference at 95% confidence level

Maine's Overnight Market Share Compared to New England – *Business Travel*

- Also in line with the year-over-year results with leisure and VFR travel, Maine experienced statistical stability in the percent share of US business travel in 2010.
- However, it is critical to note that while Maine's share of the US travel market experienced statistical stability, there were more overall travelers in the US during this time period resulting in an increase in the overall number of visitors to the state in 2010.

US Business Travel Market Share*



Nat'l Omnibus Q2. In which U.S. state, Canadian province, or other country was the primary destination of each of these trips? Share of total trips taken by U.S. residents.

*2008 data was reweighted to represent the same year-over-year timeframe as 2009. As such, 2008 results may vary slightly from those published in the 2008 Annual Report.

↑↓ notes significant year-over-year difference at 95% confidence level

Estimated Visitation to Maine

- Maine experienced a 7% increase in the number of overnight trips and an 11% increase in the number of overnight visitors in 2010 compared to the same period in 2009. These numbers are largely driven by increases seen in summer 2010 compared to summer 2009, however, strong percentage increases were also seen in winter travel to the state.
- Day visitation had a 9% increase in the number of trips and a corresponding 7% improvement in the number of visitors in 2010 compared to the same period in 2009. This was also driven by gains in summer travel to Maine.

Overnight Travel						Day Travel				
	Leisure	Business	VFR	Total	Y/Y Change	Leisure	Business	VFR	Total	Y/Y Change
Net 2010 Maine Trips	3,150,758	2,736,318	1,127,174	7,014,250	7.3%	4,324,106	2,460,777	1,648,098	8,432,982	8.9%
Net 2010 Visitors	8,964,856	6,509,794	2,242,496	17,717,145	10.9%	11,402,375	5,871,276	2,594,713	19,868,458	6.5%
Summer Trips	1,747,563	1,256,061	565,017	3,568,640	9%	3,054,081	1,708,363	1,044,242	5,806,687	13%
Summer Visitors	5,190,261	3,228,076	1,096,133	9,514,470	14%	8,123,856	4,014,653	1,576,806	13,715,316	8%
Fall Trips	931,819	962,879	341,667	2,236,365	2.0%	752,232	440,291	367,180	1,559,703	1.1%
Fall Visitors	2,506,593	2,127,964	683,334	5,317,890	5.1%	1,963,324	1,091,922	613,191	3,668,530	3.4%
Winter Trips	471,376	517,378	220,490	1,209,245	12.1%	517,793	312,123	236,676	1,066,592	-1.6%
Winter Visitors	1,268,002	1,153,754	463,029	2,884,785	10.9%	1,315,195	764,701	404,716	2,484,612	2.6%

Estimated Visitor Expenditures

- The combination of more visitors to Maine and increased spending per trip resulted in year-over-year spending growth among Maine visitors in 2010.

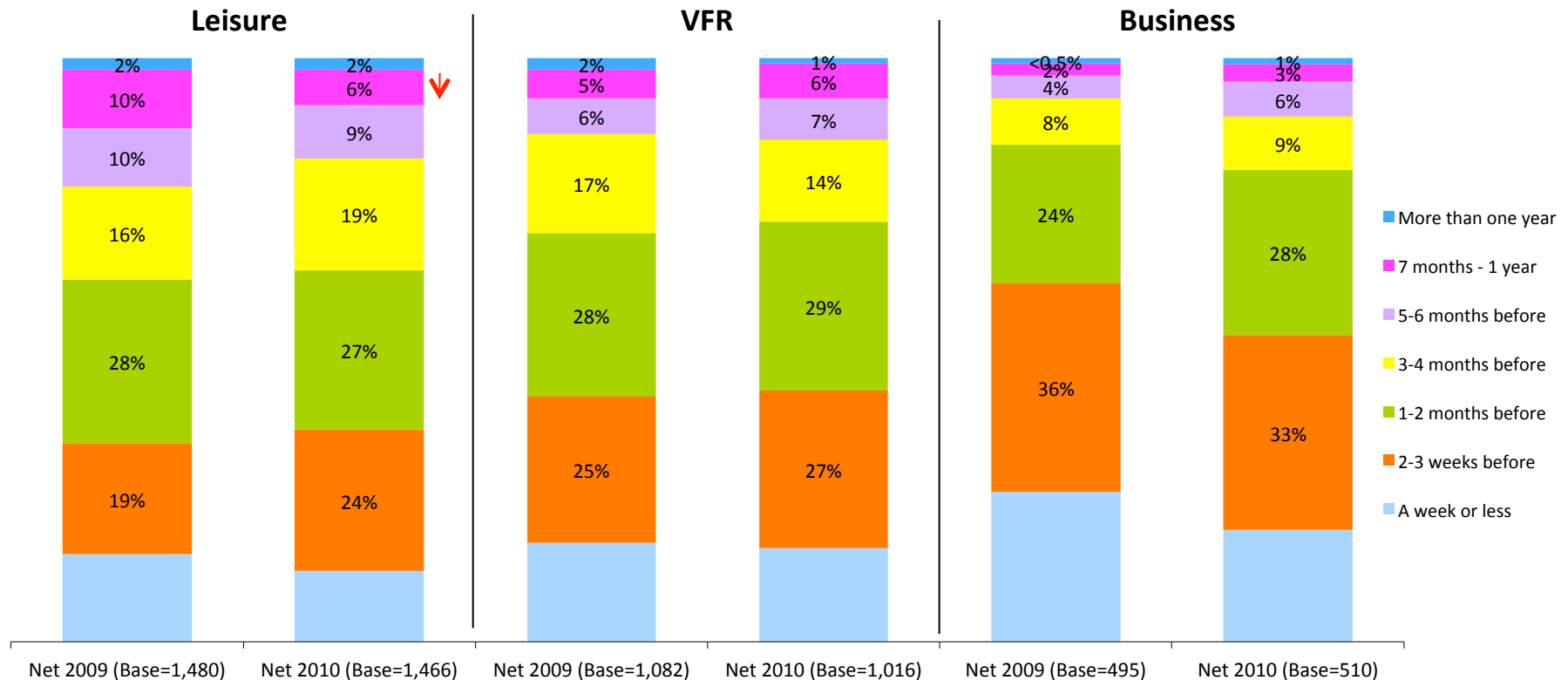
Overnight Travel					
	Leisure	Business	VFR	Total	Year-Over-Year Change
Net Spending	\$ 2,483,774,039	\$ 963,512,294	\$ 792,279,333	\$ 4,239,565,666	5.8%
Spending by Category:					
Lodging	\$ 819,197,080	\$ 164,179,080	\$ 338,152,200	\$ 1,321,528,360	23.5%
Transportation	\$ 274,115,946	\$ 205,223,850	\$ 101,445,660	\$ 580,785,456	8.9%
Food	\$ 630,151,600	\$ 273,631,800	\$ 169,076,100	\$ 1,072,859,500	-2.6%
Retail Goods	\$ 606,016,794	\$ 238,278,571	\$ 151,154,033	\$ 995,449,399	-6.8%
Recreation	\$ 154,292,619	\$ 82,198,993	\$ 32,451,339	\$ 268,942,951	14.7%
Day Travel					
Net Spending	\$ 877,923,241	\$ 348,101,514	\$ 165,469,039	\$ 1,391,493,795	6.2%
Spending by Category:					
Transportation	\$ 142,695,498	\$ 95,970,303	\$ 52,739,136	\$ 291,404,937	4.6%
Food	\$ 216,205,300	\$ 123,038,850	\$ 32,961,960	\$ 372,206,110	4.4%
Retail Goods	\$ 449,577,301	\$ 104,189,298	\$ 64,341,746	\$ 618,108,345	6.8%
Recreation	\$ 69,445,142	\$ 24,903,063	\$ 15,426,197	\$ 109,774,403	14.1%

Planning an Overnight Trip to Maine



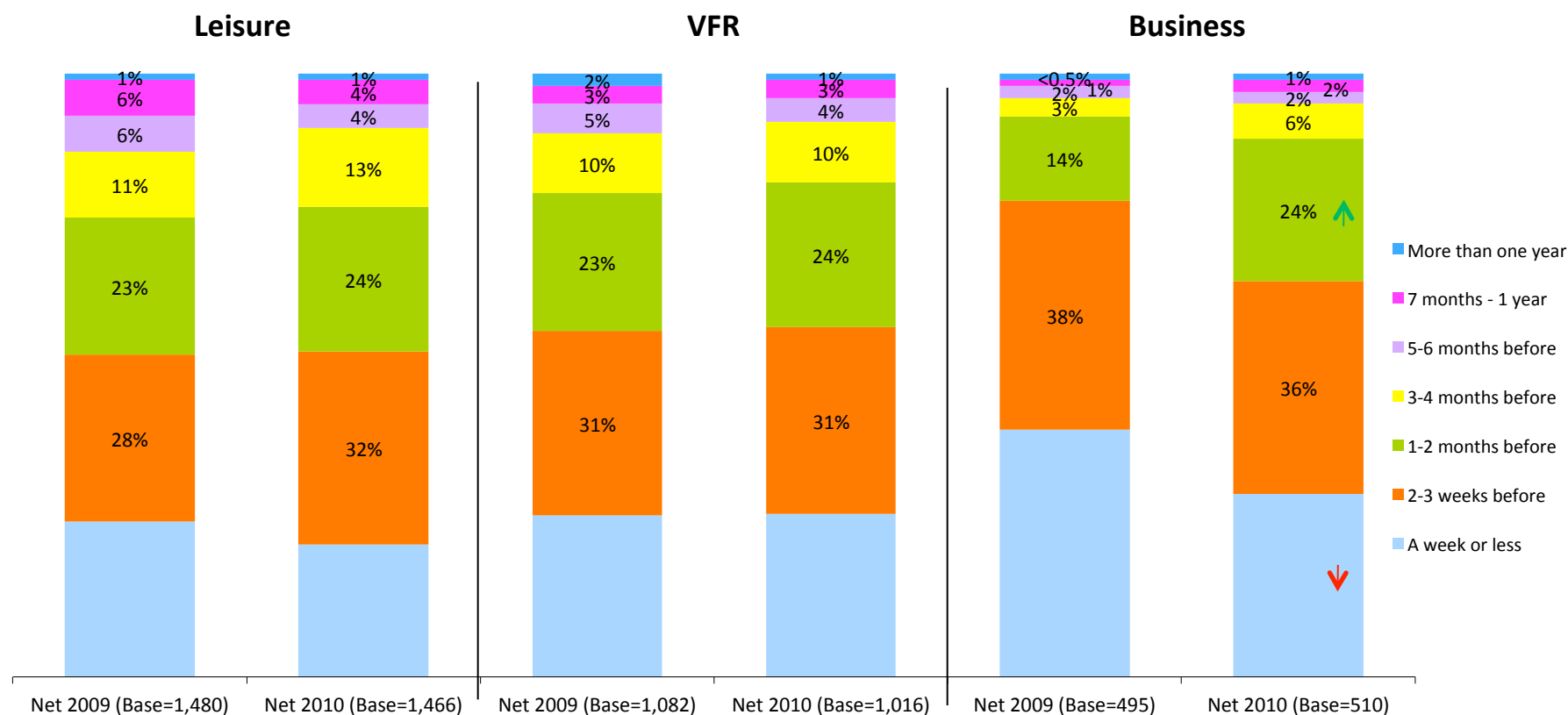
Planning Timeframe: Began to Think About Trip

- Across VFR and business – there were no significant year-over-year changes in the time period that elapsed between when a traveler began thinking about their trip to Maine and when they went on that trip. For leisure, the only significant difference is a slight decrease in those who began thinking about a trip seven months to one year before travel.
- The charts below illustrate that leisure trip planning begins the furthest in advance, followed by VFR trips, and finally business trips, which are more likely to be planned within 2-3 weeks of the trip.



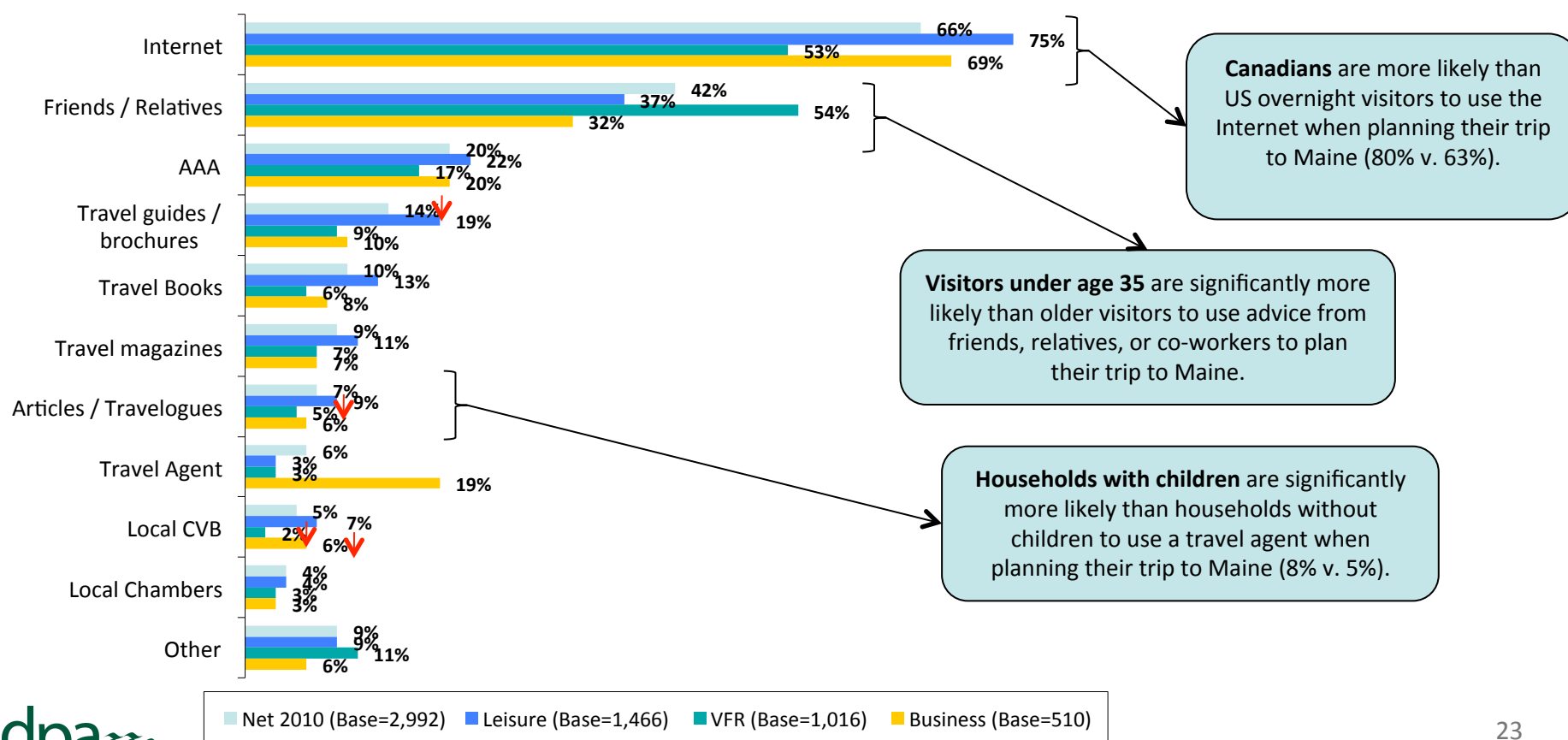
Planning Timeframe: Decided to Take Trip

- In 2010, the planning horizon for business trips became slightly less 'last minute,' as more business trips were being planned in advance.
- Also consistent with the previous slide, leisure trips tend to be decided upon further in advance than VFR and business trips.



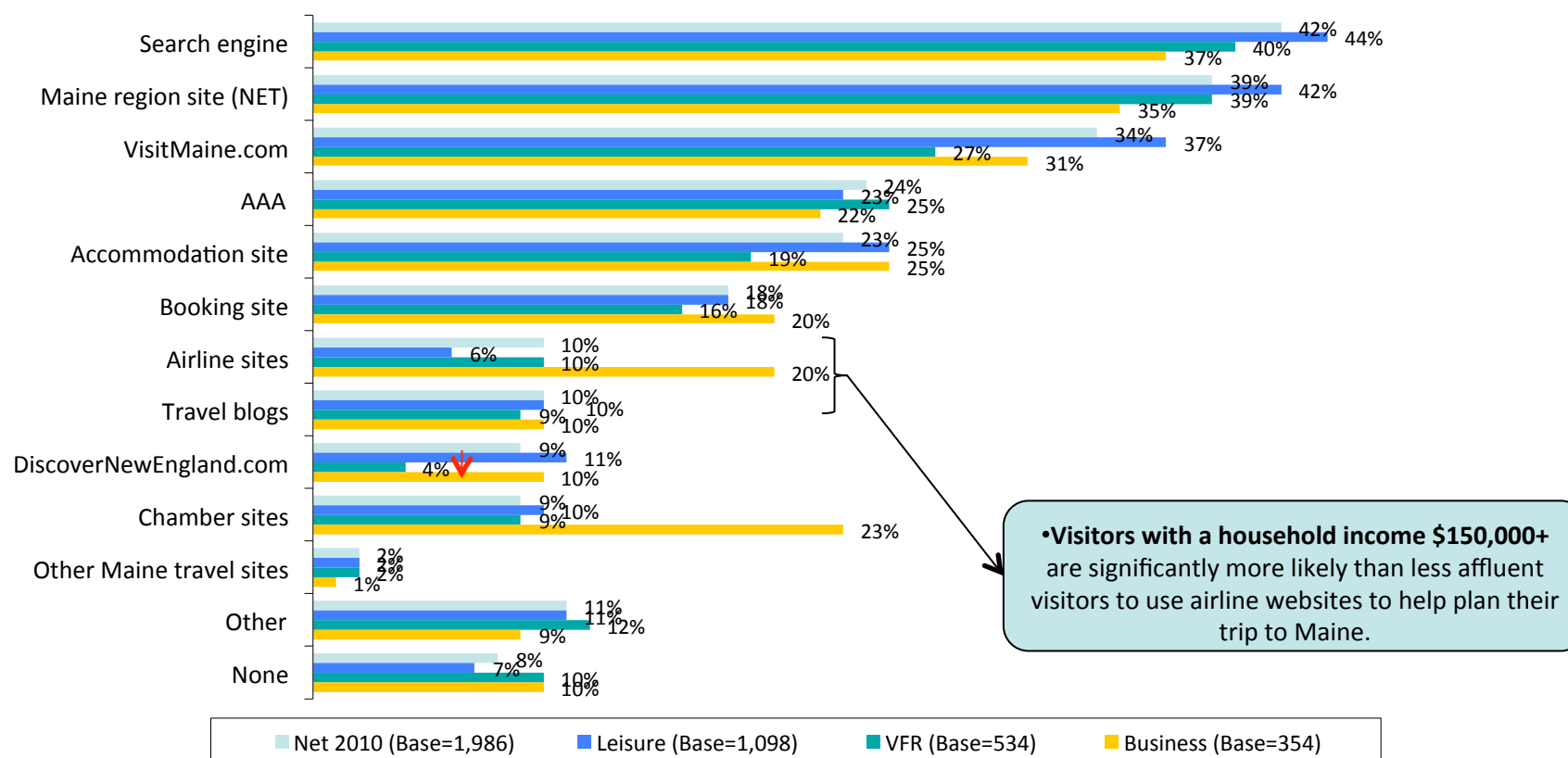
Trip Planning Sources

- Across trip types, the Internet remains the most widely used trip planning source for overnight trips to Maine. The percent of overnight visitors to Maine who used the Internet remained statistically stable with the same period in 2009. Although, for VFR, the advice of friends and relatives is equally important.
- There was a significant year-over-year decline in the percent of overnight visitors who used travel guides to plan their trip to Maine.



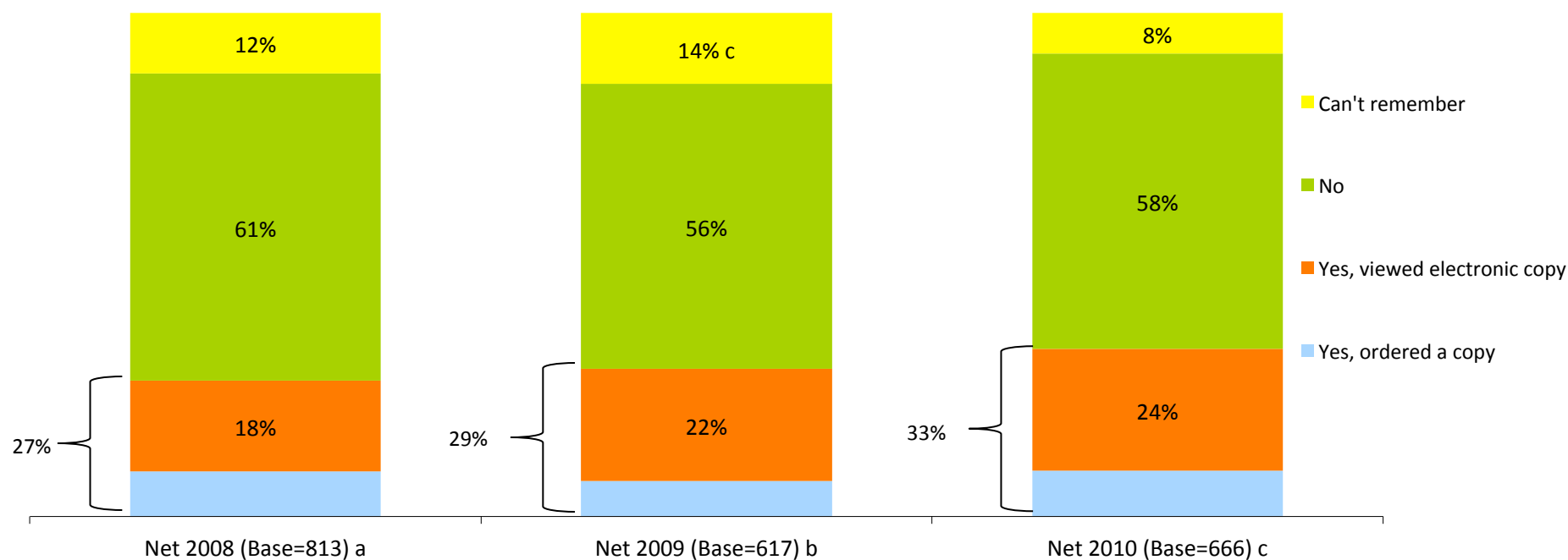
Online Trip Planning Sources

- Use of online planning sources was statistically stable with 2009 usage. Users continue to utilize search engines as well as regional websites and VisitMaine.com to help plan their trip(s) to Maine.



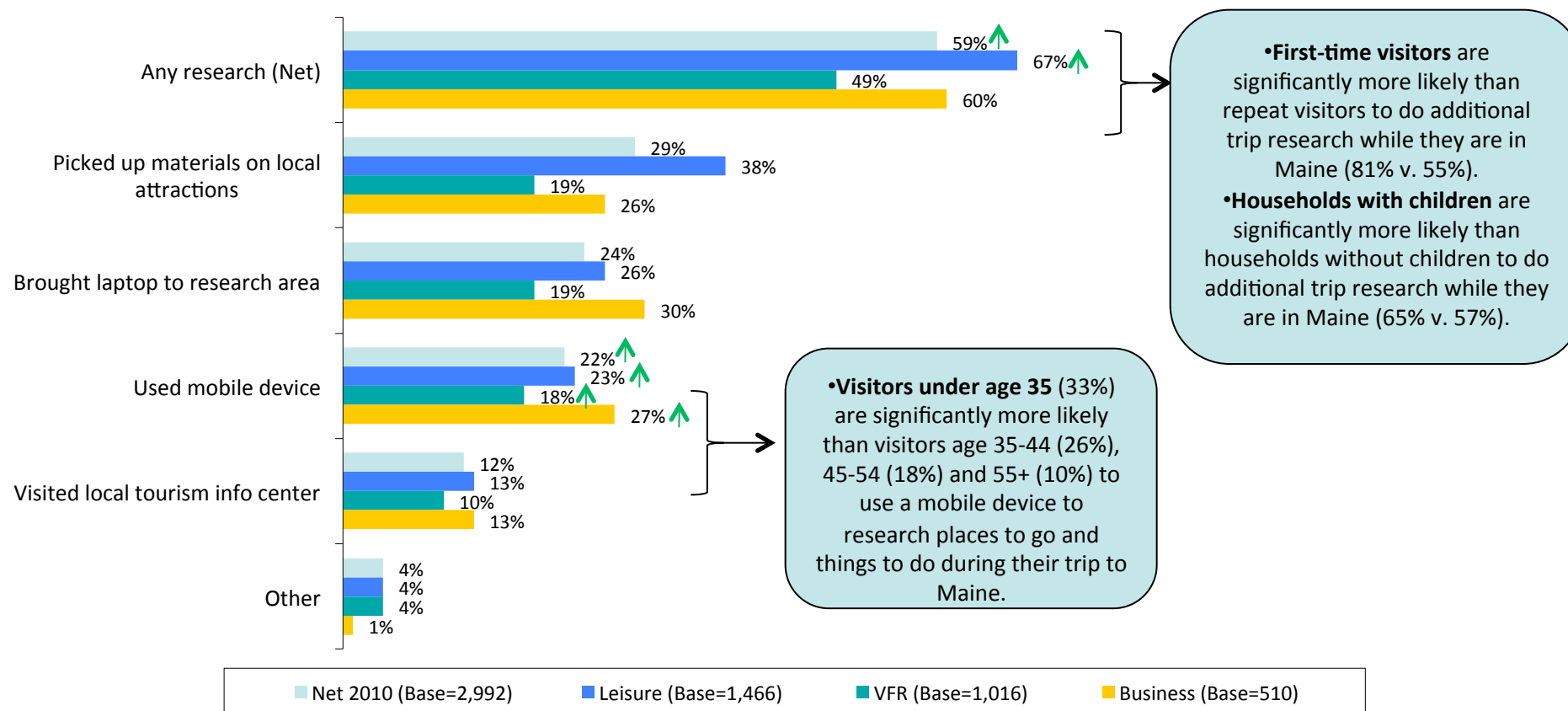
Maine Invites You Usage Through VisitMaine.com

- One-third of overnight visitors to Maine who went to VisitMaine.com either viewed an electronic copy or ordered a copy of *Maine Invites You*. These results are statistically stable with prior years and illustrate underlying strength in the guide among visitors and prospective visitors to Maine.



Trip Research While in Maine

- Conducting research on a destination during the trip is a growing trend, and in particular, using a mobile device to research places to go and things to do continues to grow. More than half of visitors – including nearly half or more from each trip type – reported conducting additional research during their visit. Even the majority of business travelers are searching for information on this destination while here.

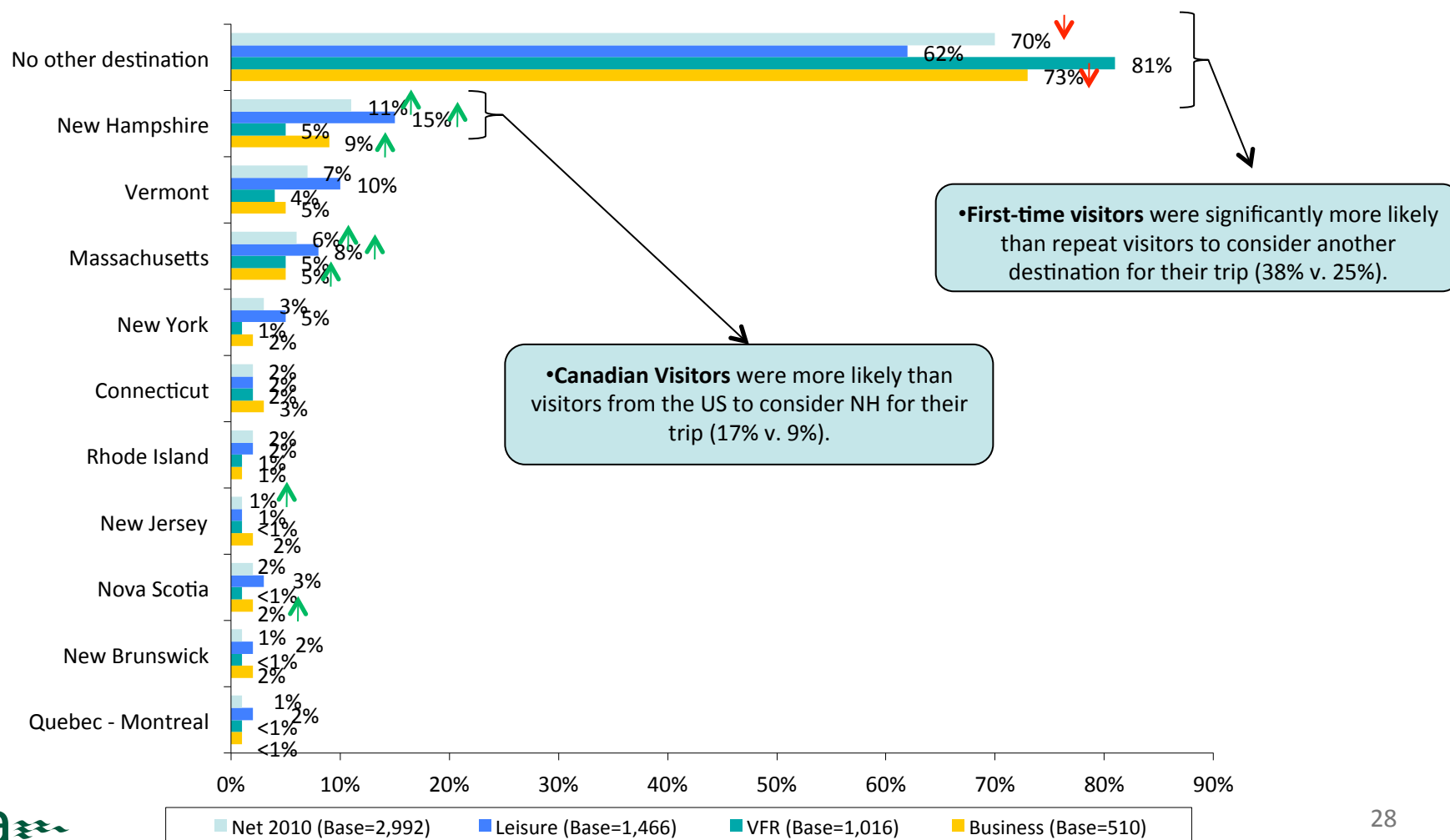


Overnight Visitor Travel Logistics



Other States Considered for Trip to Maine

- Overall, nearly three-quarters of overnight visitors to Maine did not consider any other destination when planning their trip. However, it's important to note that more than one-third of visitors *did* consider other destinations for this trip, with leisure travelers taking a closer looks and New Hampshire and Vermont.

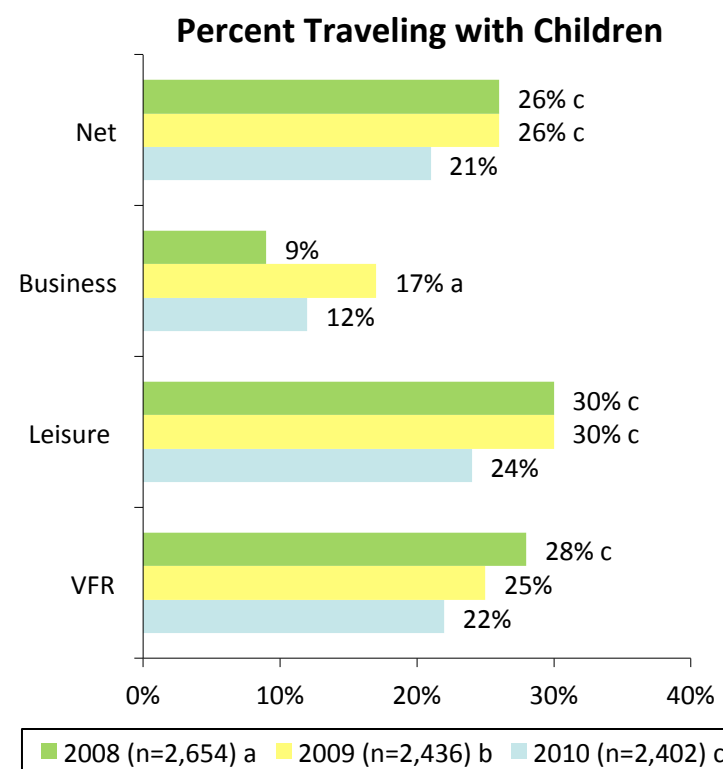
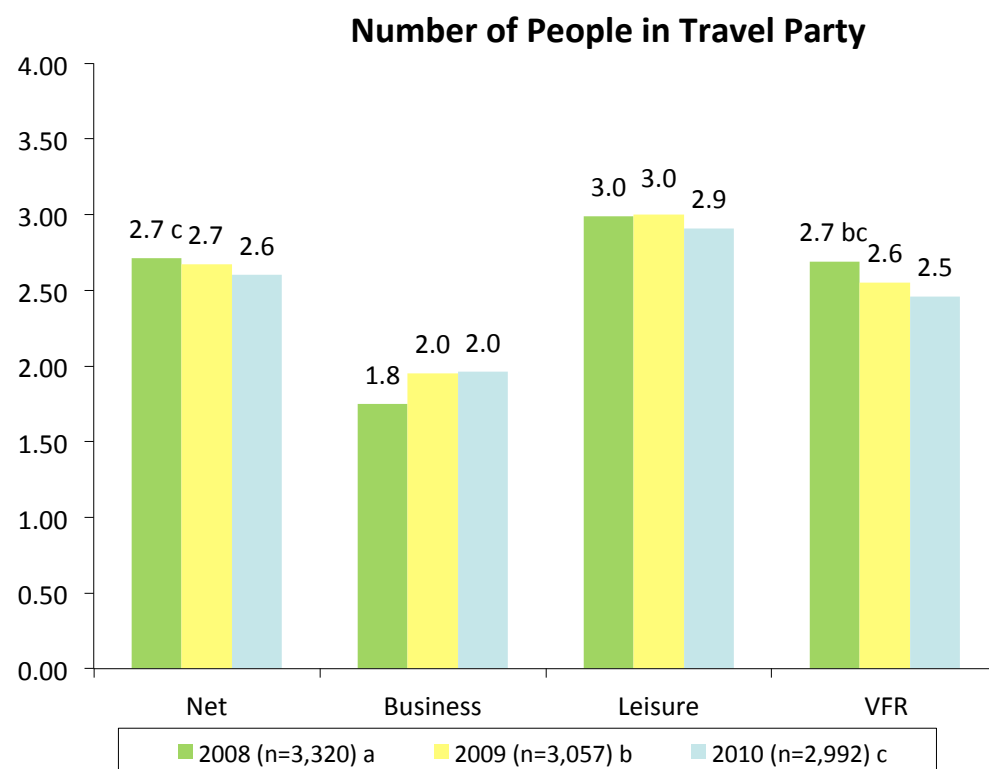


Regional Q15. What other states or provinces, if any, did you consider for this specific trip?

↑ ↓ notes significant year-over-year difference at 95% confidence level

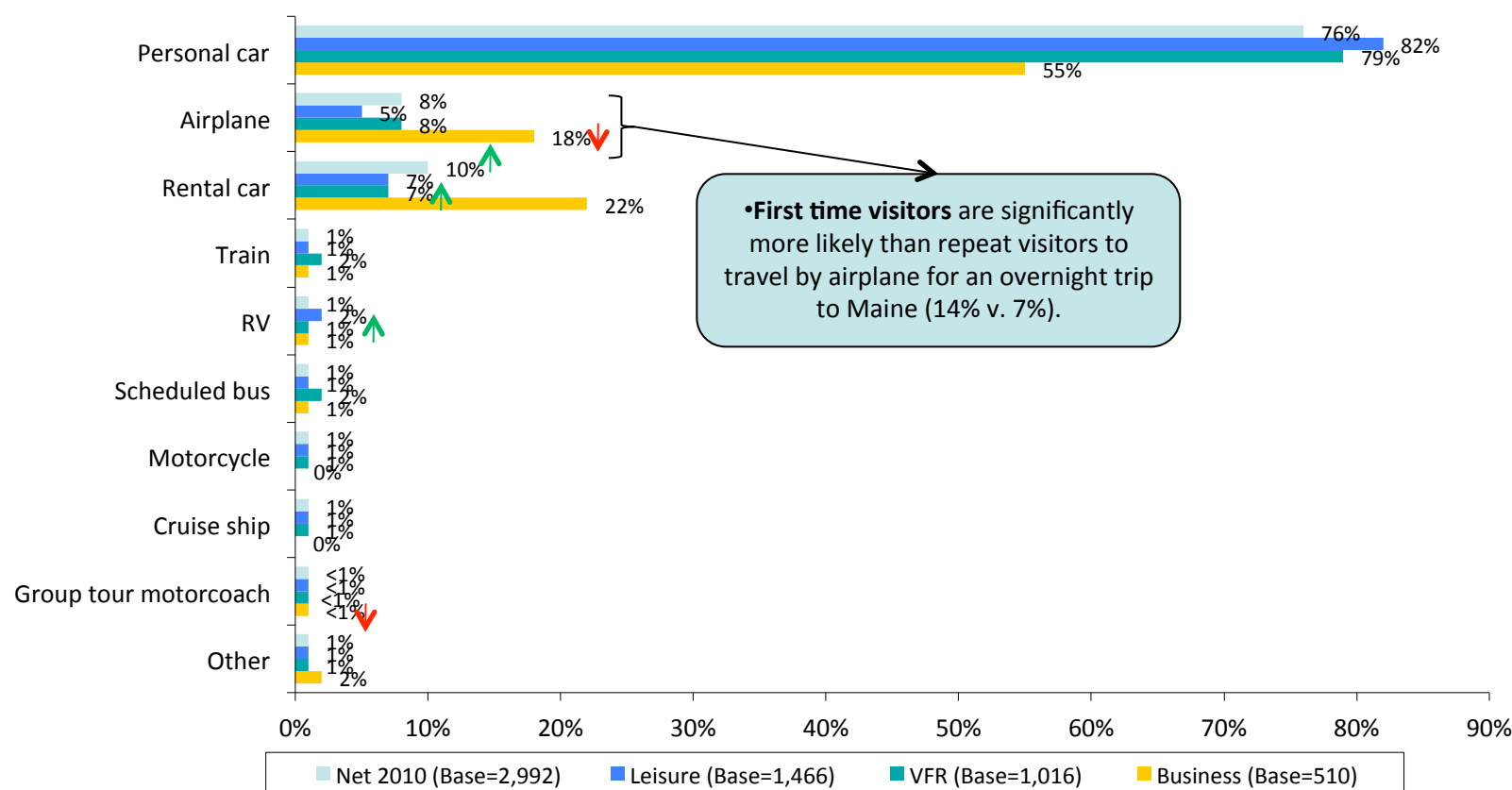
Travel Party Size and Composition

- While travel party size remained largely consistent with 2009, there was a decrease in those traveling with children.



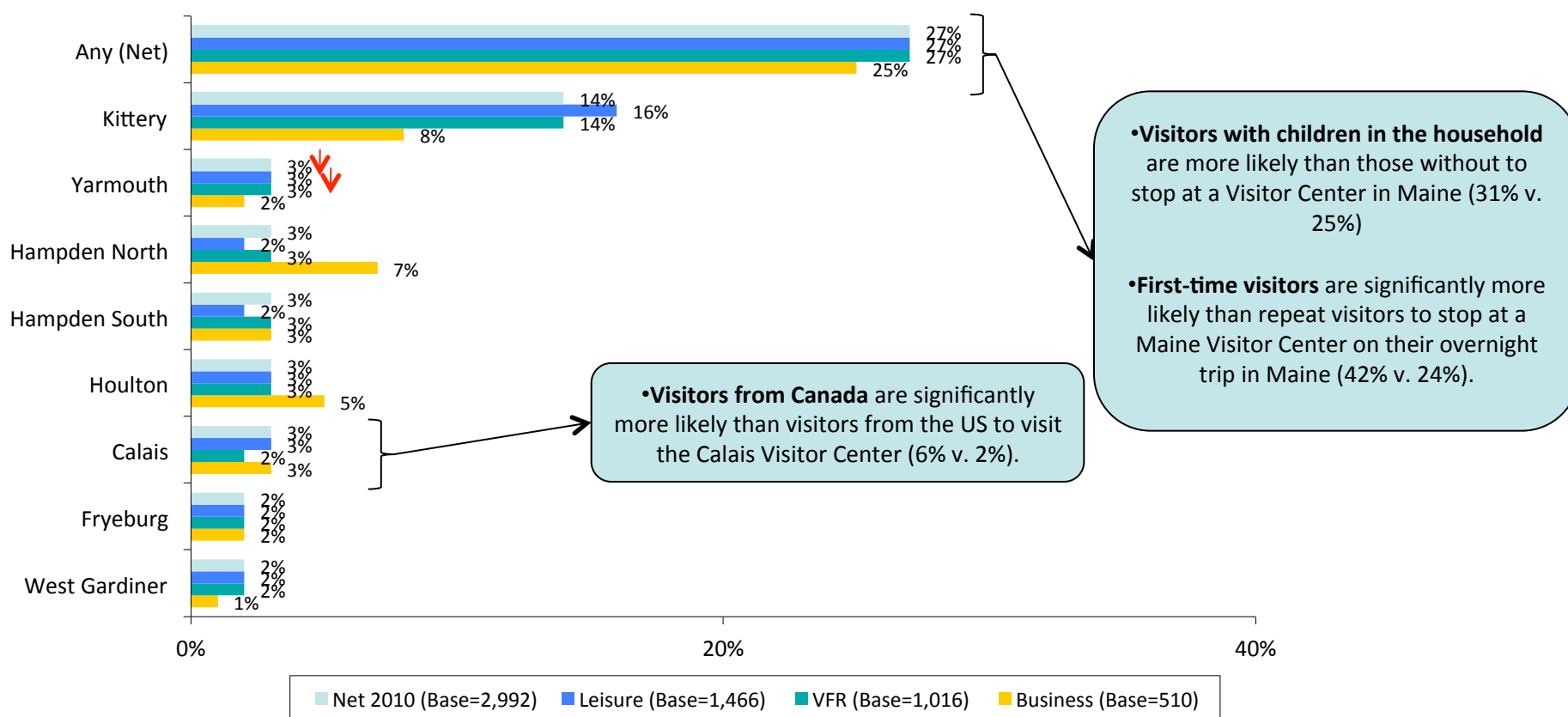
Transportation Method

- While the personal car remains by far the dominant transportation mode for traveling to Maine for an overnight visit, there were some notable year-over-year changes with other types of transport. Notably, in 2010 we saw decreased use of airplane travel by business travelers, which was offset by an increased use of rental cars. We also saw an increase in RV travel by leisure visitors.



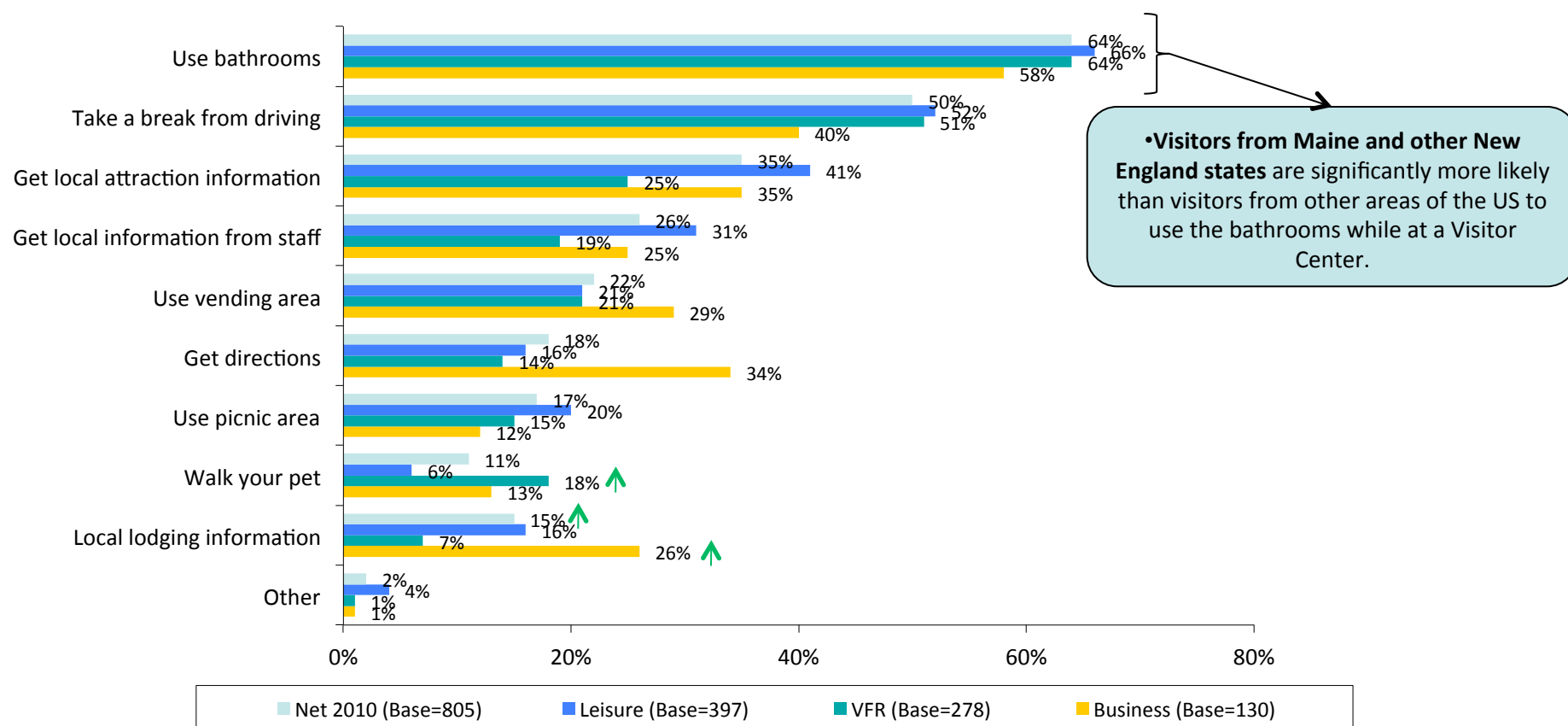
Visitor Center Usage While in Maine

- The chart below illustrates how more than one-quarter of overnight visitors reported using a Visitor Center during their trip to Maine. The Kittery Visitor's Center was used by the largest percentage of overnight visitors, serving as a gateway to Maine for visitors from Southern New England and beyond as they enter the state on the Maine Turnpike. The Yarmouth Visitor Center saw a small dip in reported usage from 2009.



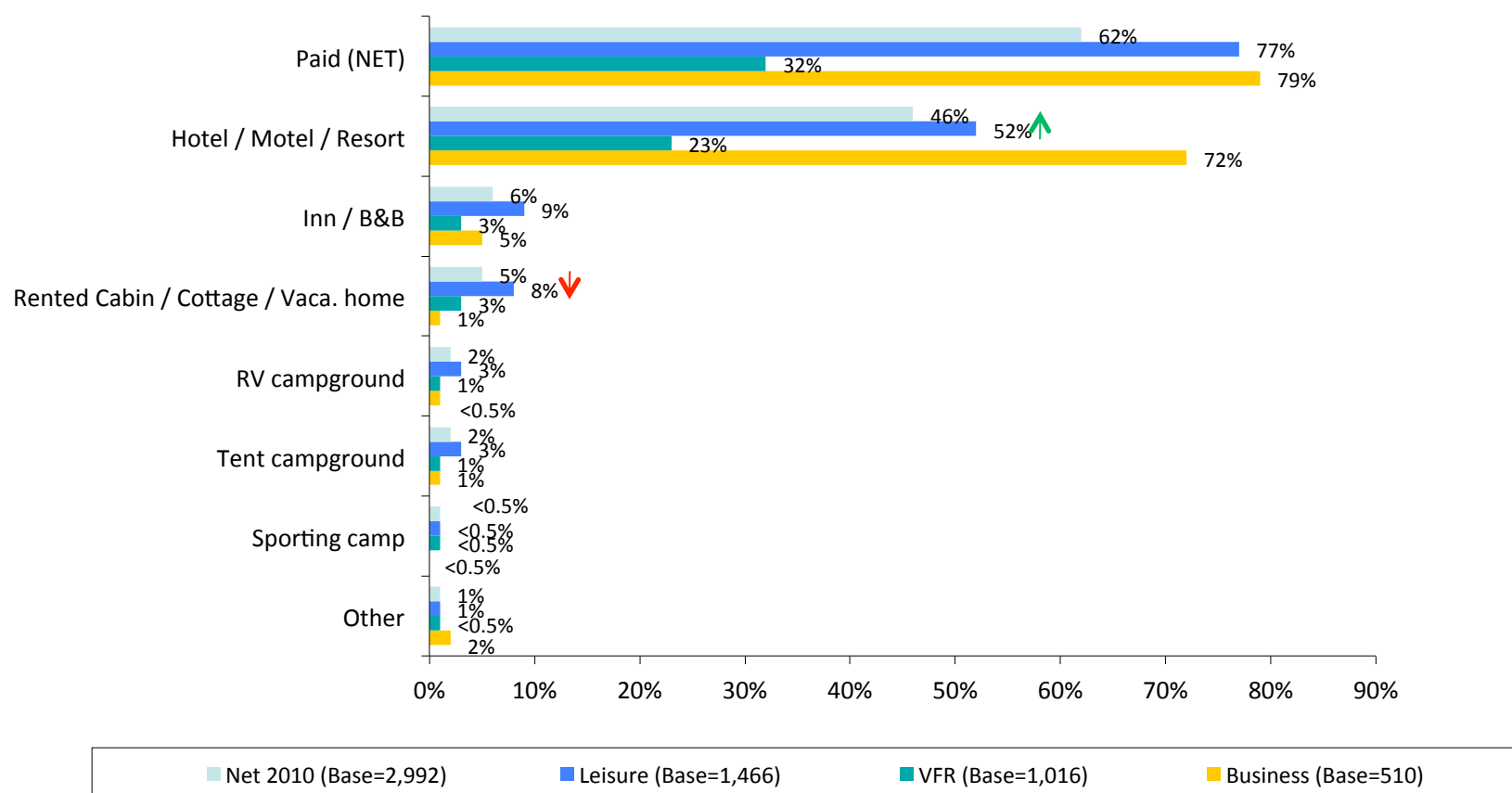
Visitor Center Usage While in Maine

- Two-thirds of overnight visitors who went to a Maine Visitor Center reported using the bathrooms at the Center. Between one-quarter and one-third used the facility to either get local information from staff or to obtain local attraction information.
- There was a significant increase in 2010 of those using the Visitor Centers to get local lodging information. This was driven by an increase in Business Travelers. More VFR travelers are stopping off to walk their pets.



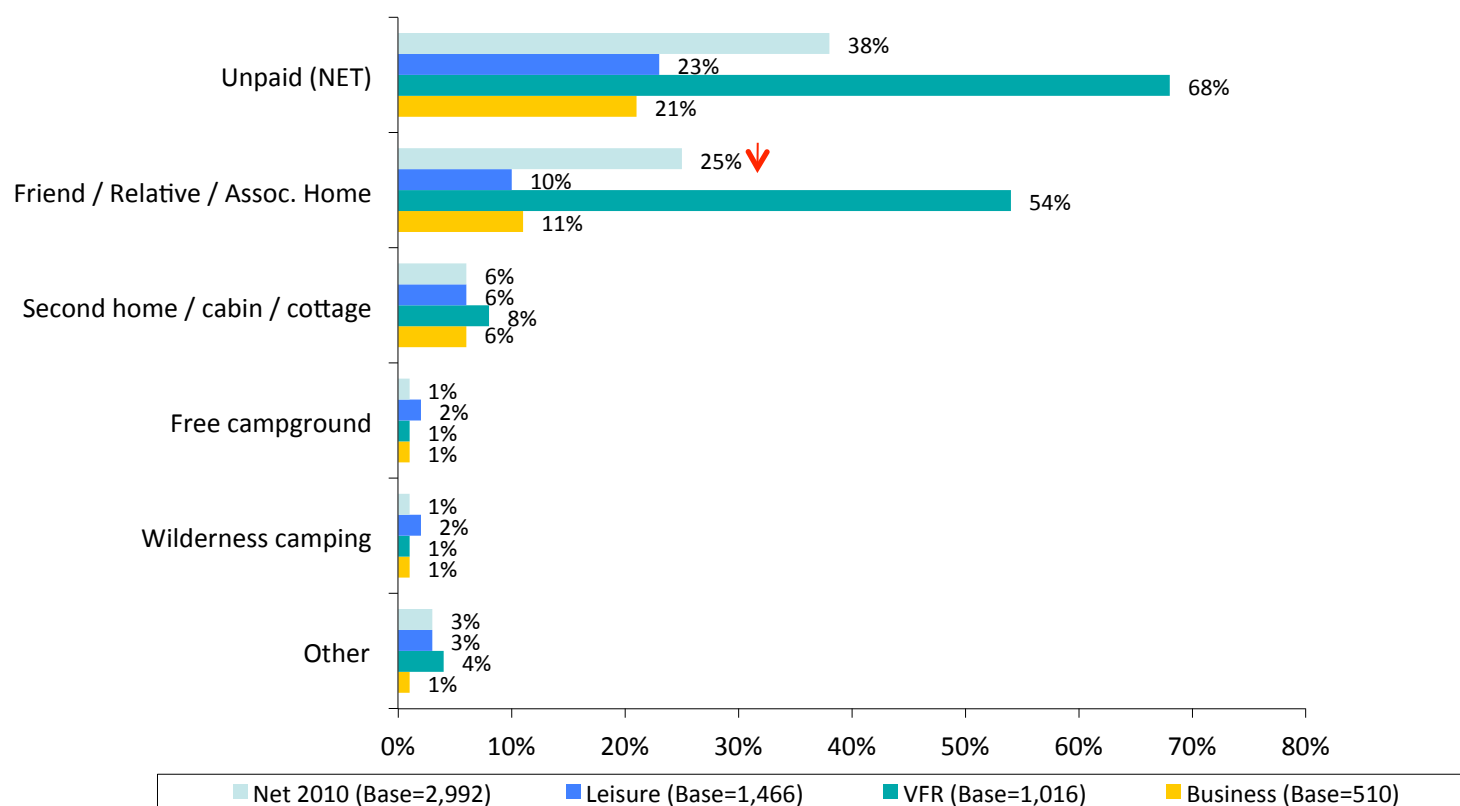
Paid Accommodations While in Maine

- Nearly half of overnight visitors to Maine stayed in a hotel, motel, or resort during their trip. This percentage is statistically stable with 2009. However, it's notable that there was a significant increase in the percent of leisure visitors who stayed in this type of accommodation - with a corresponding decrease in the percentage of leisure visitors who rented a cabin, cottage, or vacation home for their stay.



Unpaid Accommodations While in Maine

- There was a significant year-over-year decline in the percentage of overnight visitors to Maine who stayed with a friend, relative, or associate's home during their trip. The percent of overnight visitors who stayed in other types of unpaid accommodations during their trip primarily saw year-over-year statistical stability between 2008 and 2009.

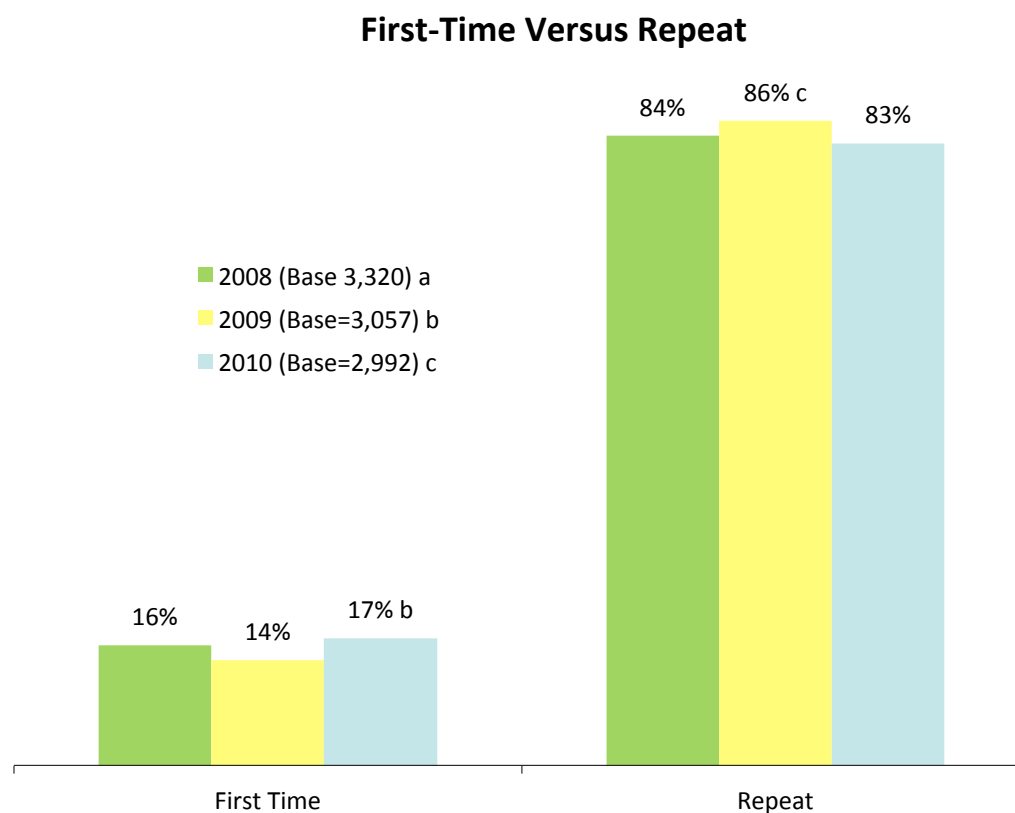


The Maine Overnight Visitor Experience



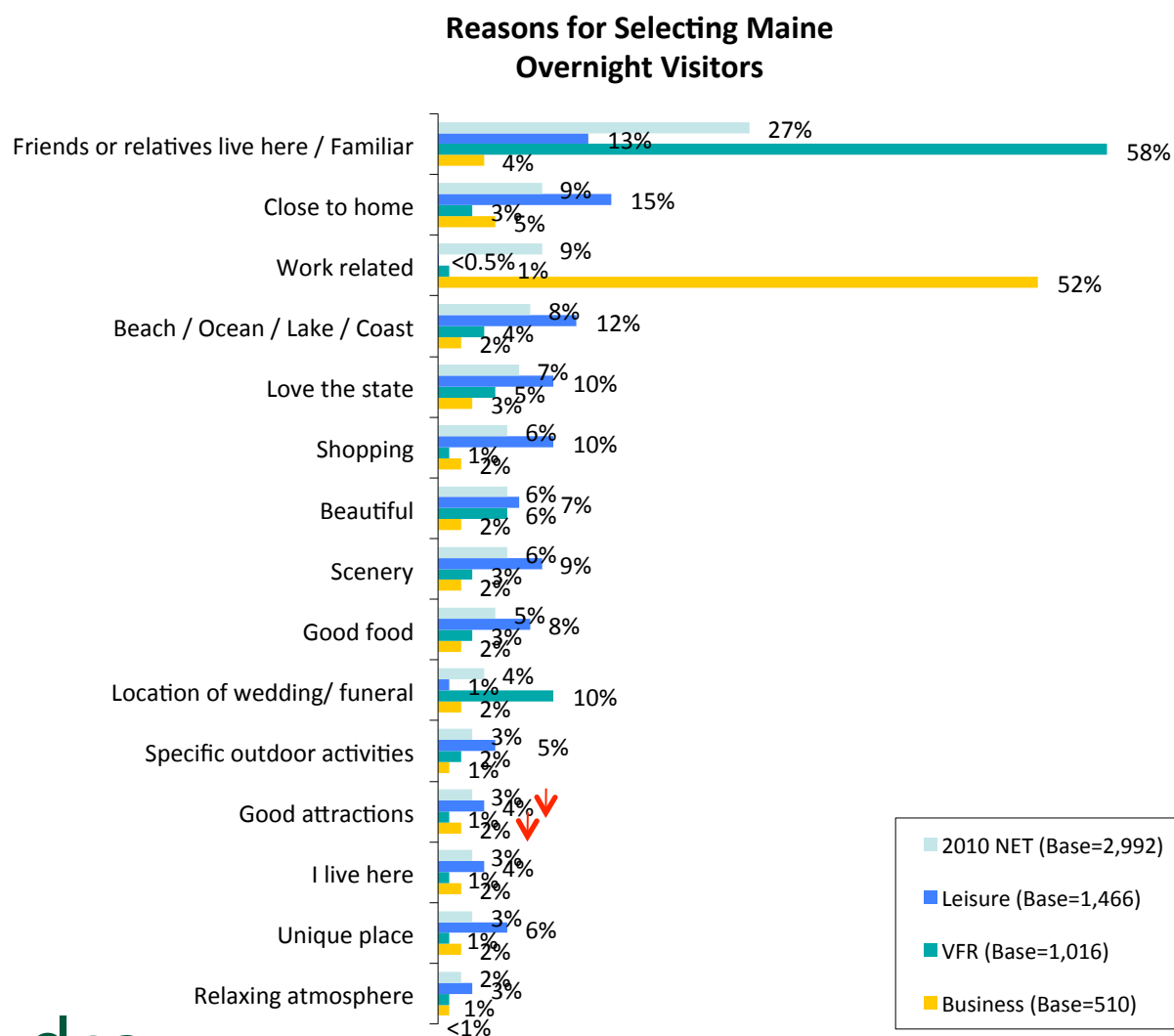
Repeat versus First Time Visitors

- Less than two in ten visitors to the state are first time visitors.
- However, versus 2009, we do see a significant increase in this proportion. It is also important to note, that the proportion of total travelers has increased, thus the impact of this proportion gain is even greater in terms of actual first time visitors.



Reasons for Selecting Maine

- There was largely year-over-year stability with the reasons why overnight visitors selected Maine for their trip. There was a small decrease in those selecting Maine because of its good attractions.



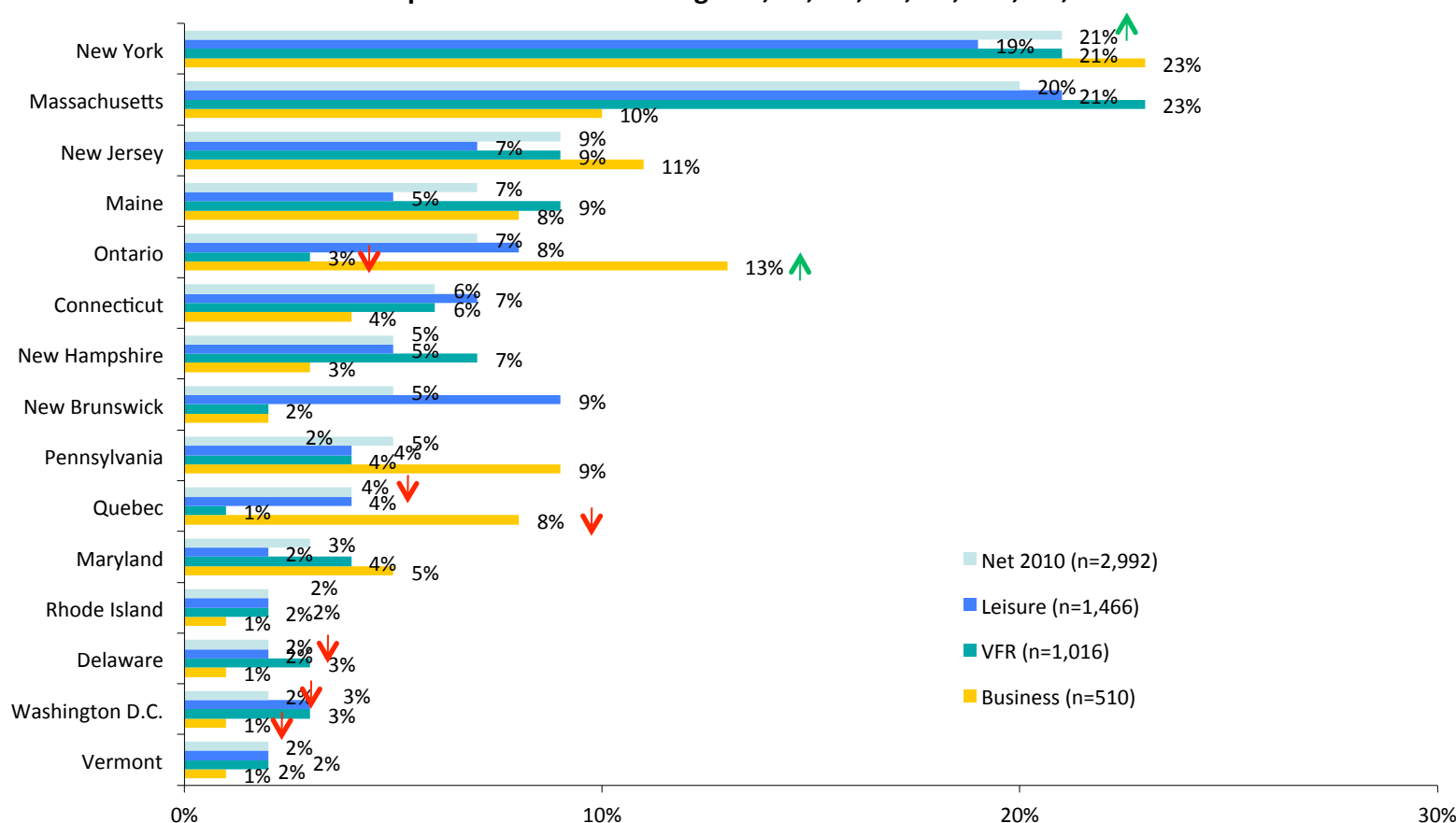
•Visitors who do not have children are significantly more likely than those who do have children to have selected Maine because of the food/restaurants (6% v. 3%).

•As originally noted in 2008, **Canadian visitors** are significantly more likely than visitors from the US to have selected Maine because of the shopping (15% v. 1%).

Residence of Maine Overnight Visitors

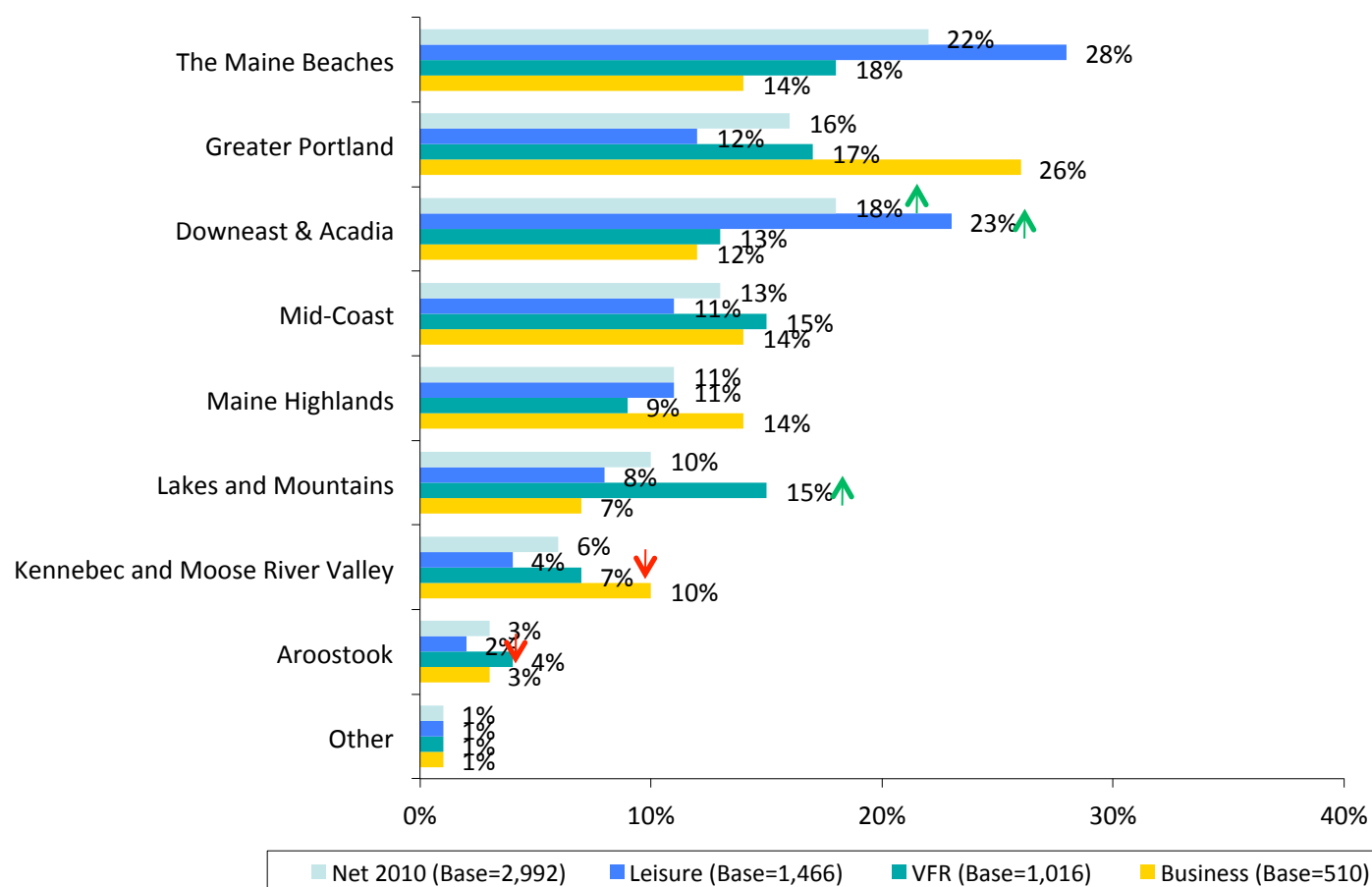
- Massachusetts and New York continue to source the greatest percentage of overnight visitors to Maine, each representing approximately one-fifth of overnight visitors to the State.
- Comparing 2010 to the same period in 2009, there was a small but significant decrease in the percentage of overnight visitors from Quebec and Washington D.C.

Base: People who Live in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada



Primary Region of Visit to Maine

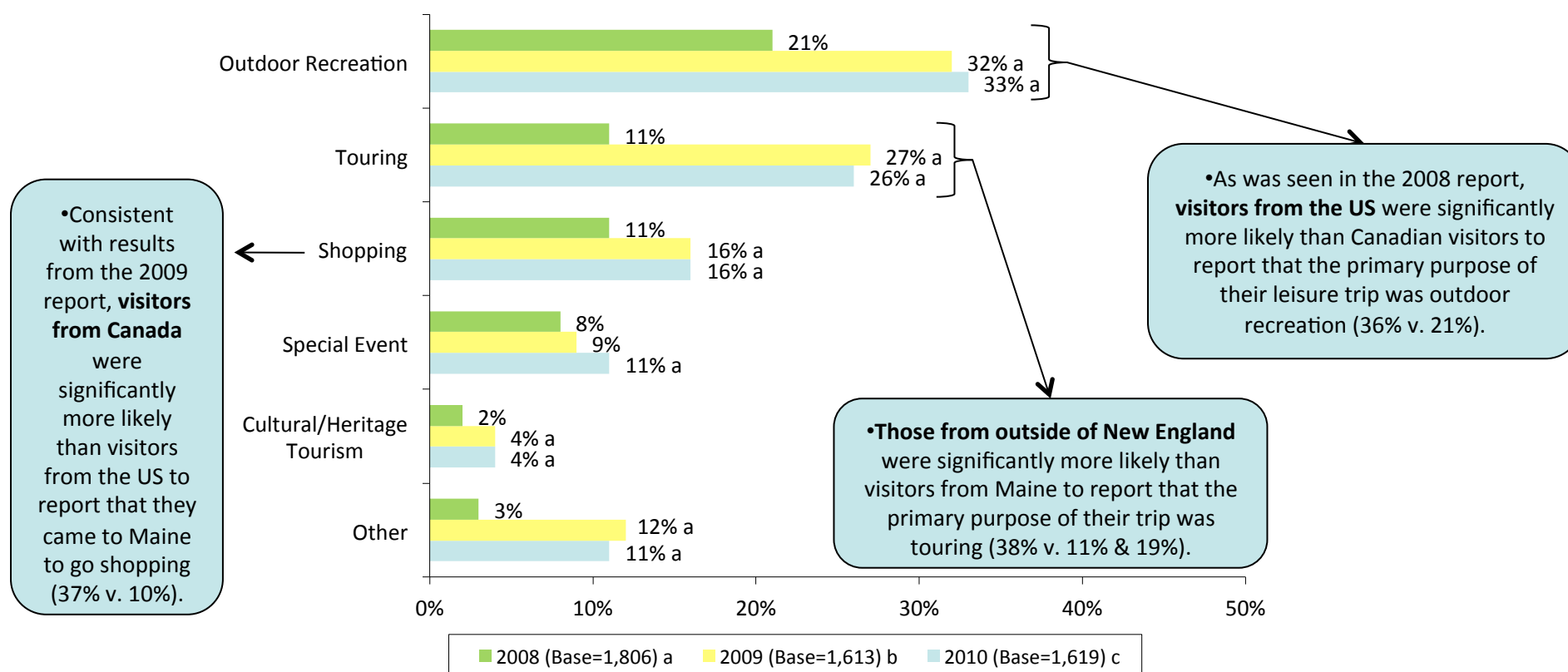
- The Southern Maine Coast, Greater Portland, and the Downeast & Acadia regions remain the most widely visited regions in Maine. Notably, there was a significant year-over-year increase in the percent of overnight visitors who traveled to the Downeast & Acadia region in 2010.



Primary Purpose of Overnight Leisure Trips

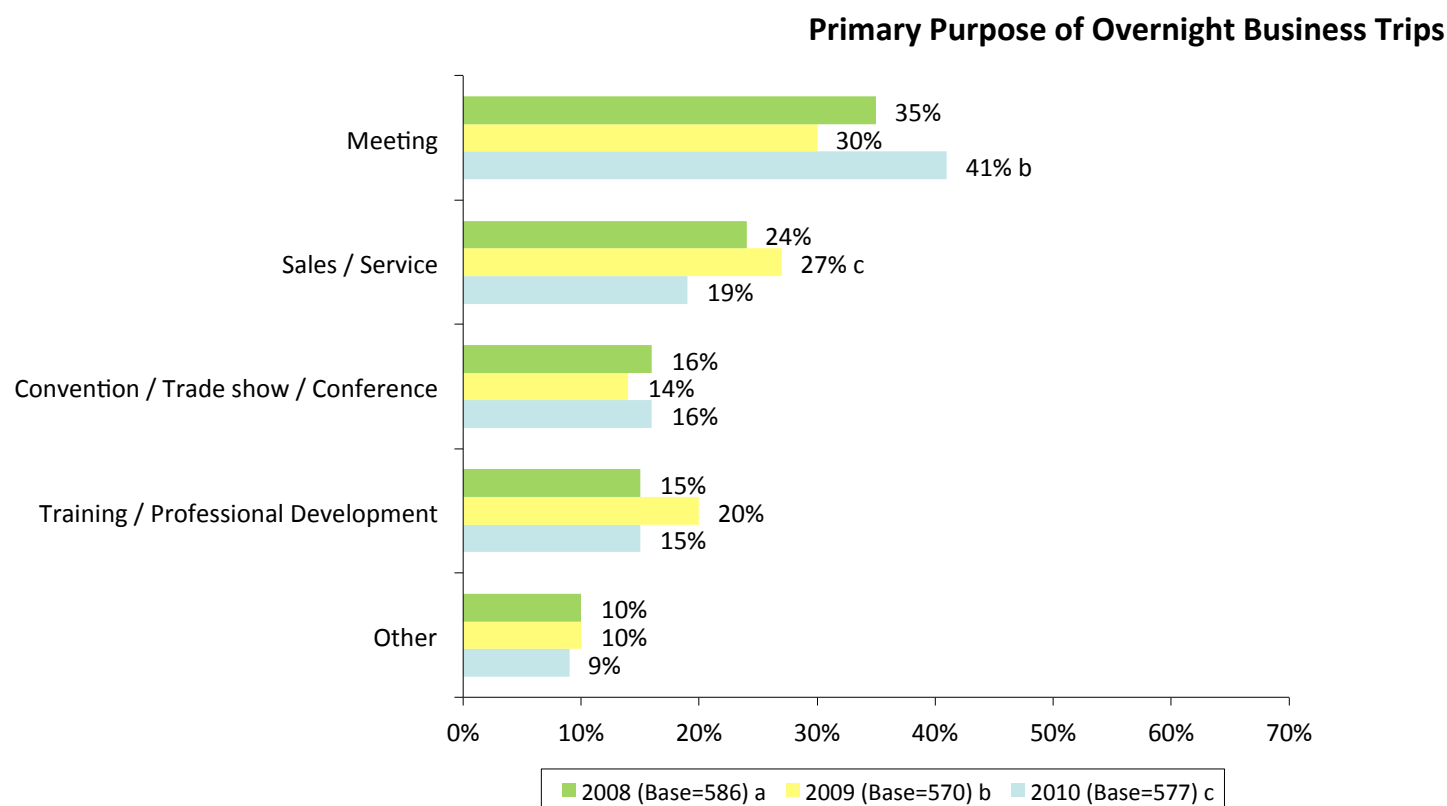
- One-third of overnight leisure visitors to Maine reported that outdoor recreation was the primary purpose of their visit, making this the most widely-cited primary trip purpose for the State. This was followed by the one-quarter of overnight visitors who came to Maine for touring and one-sixth of overnight visitors who primarily came to shop.

Primary Purpose of Overnight Leisure Trips



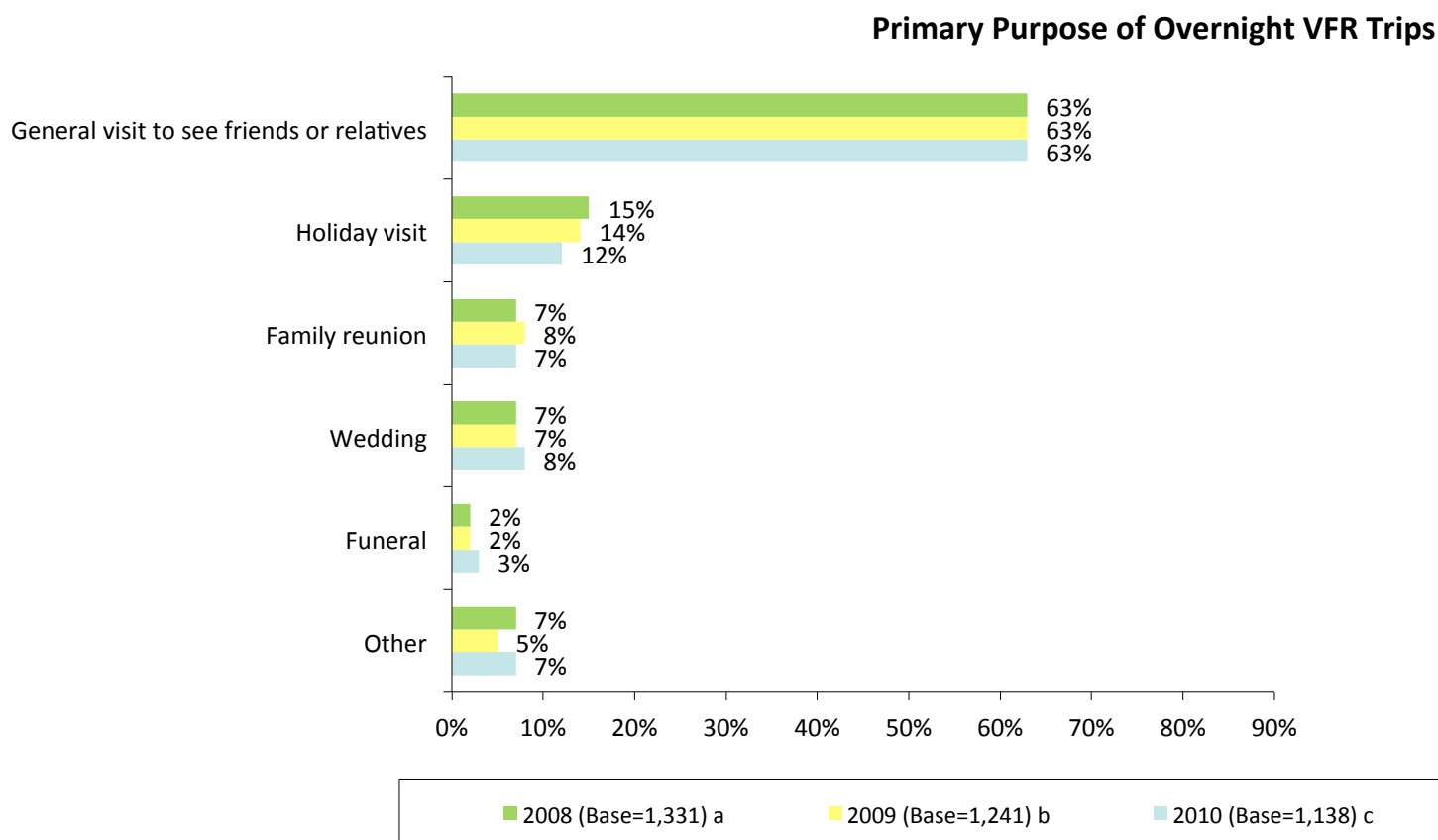
Primary Purpose of Overnight Business Trips

- More than one-third of business travelers to Maine reported that a meeting was the primary purpose of their trip, up from 2009. This was followed by sales or service appointments – which are down from a year ago.



Primary Purpose of Overnight VFR Trips

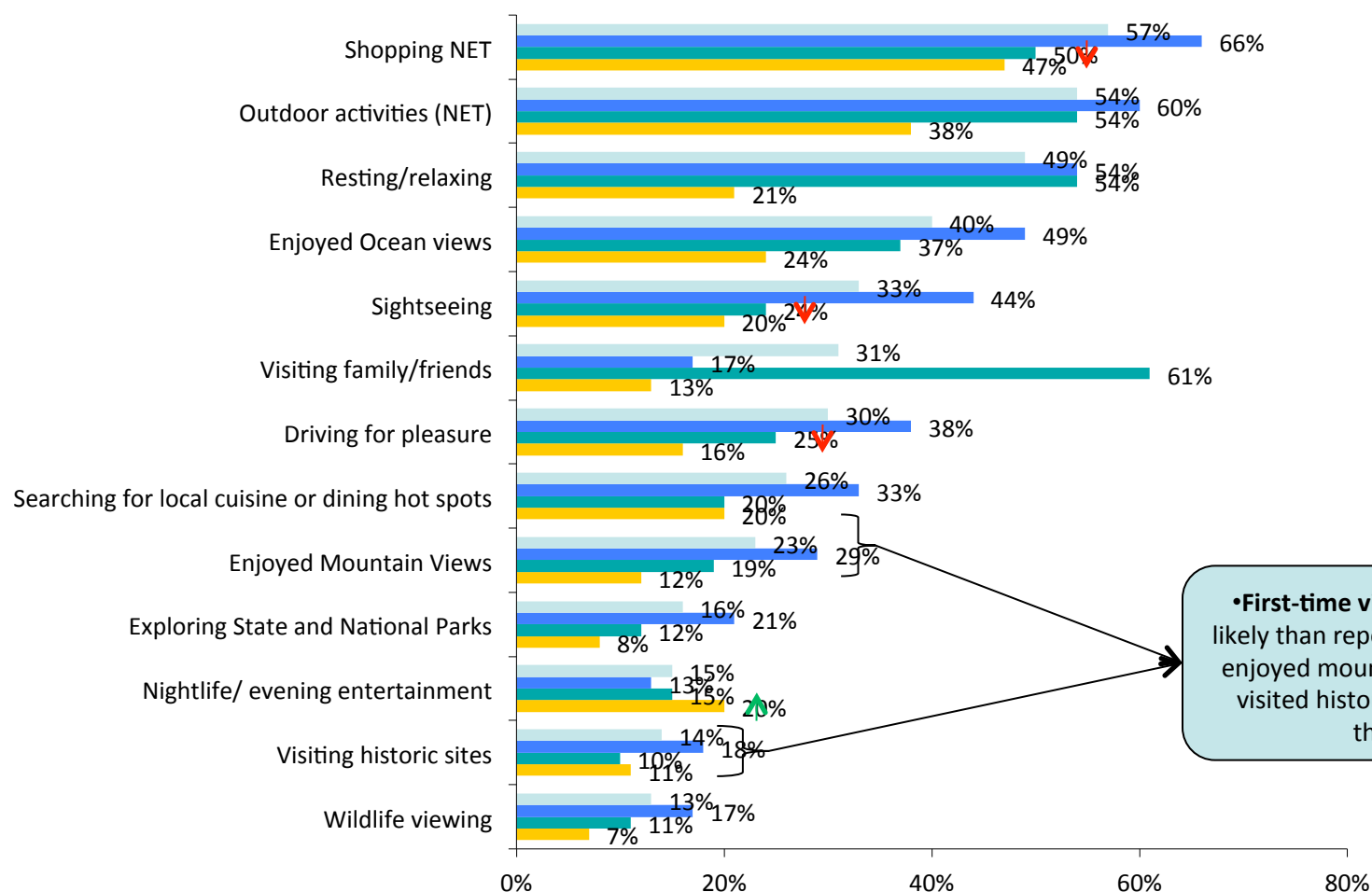
- There was year-over-year statistical stability with the primary purpose of overnight VFR trips to Maine. Nearly two-thirds of this group reported that the primary purpose of their trip to the State was a general visit to see friends or relatives. This was overwhelmingly the most widely-cited purpose of these trips.



Trip Activities

- Shopping and outdoor activities are the top trip activities among overnight visitors to Maine, enjoyed by more than half of this group while they are in the state.

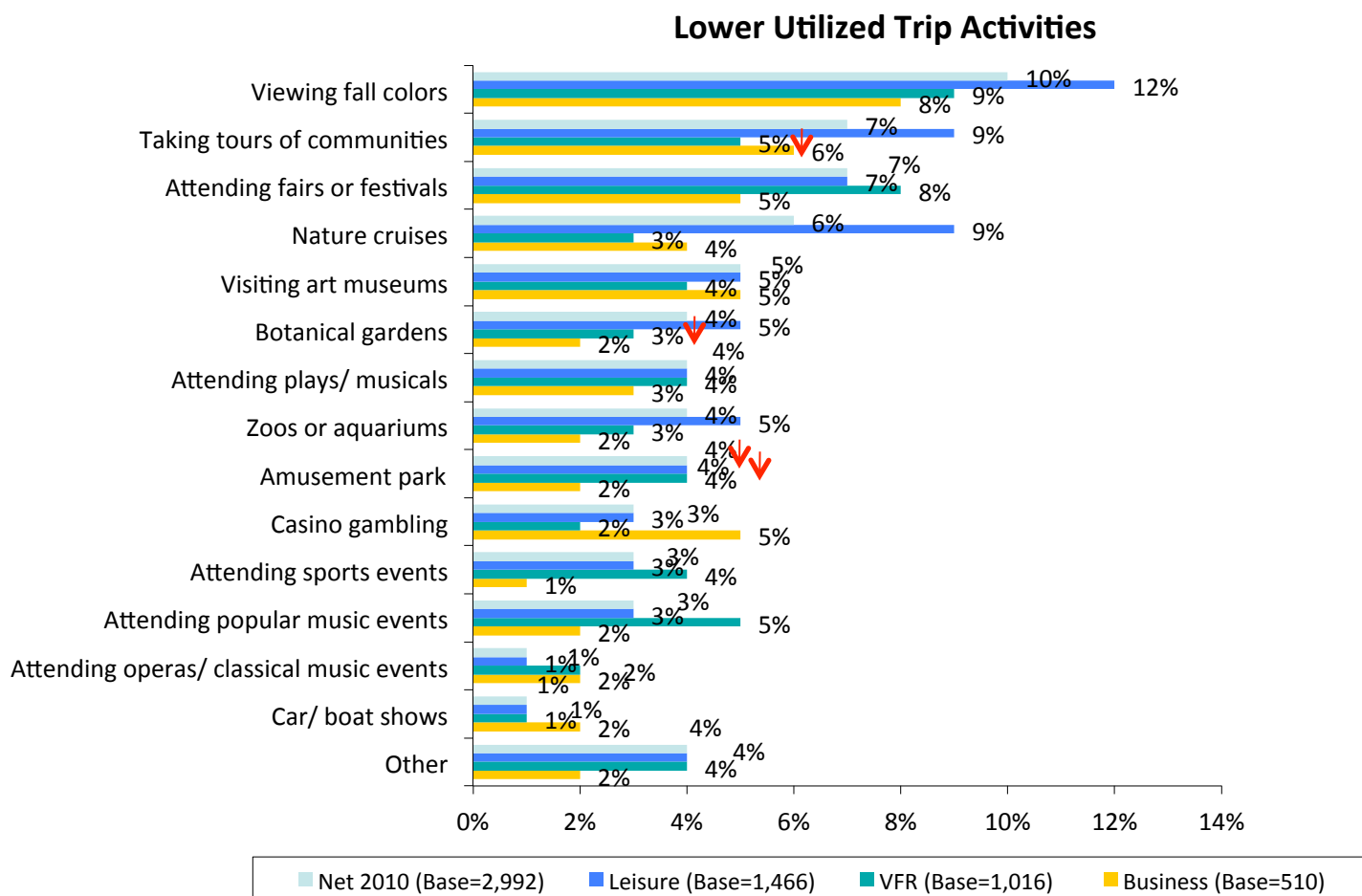
Top Trip Activities



•**First-time visitors** are significantly more likely than repeat visitors to report that they enjoyed mountain views (30% v. 21%) and visited historic sites (19% v. 13%) during their trip to Maine.

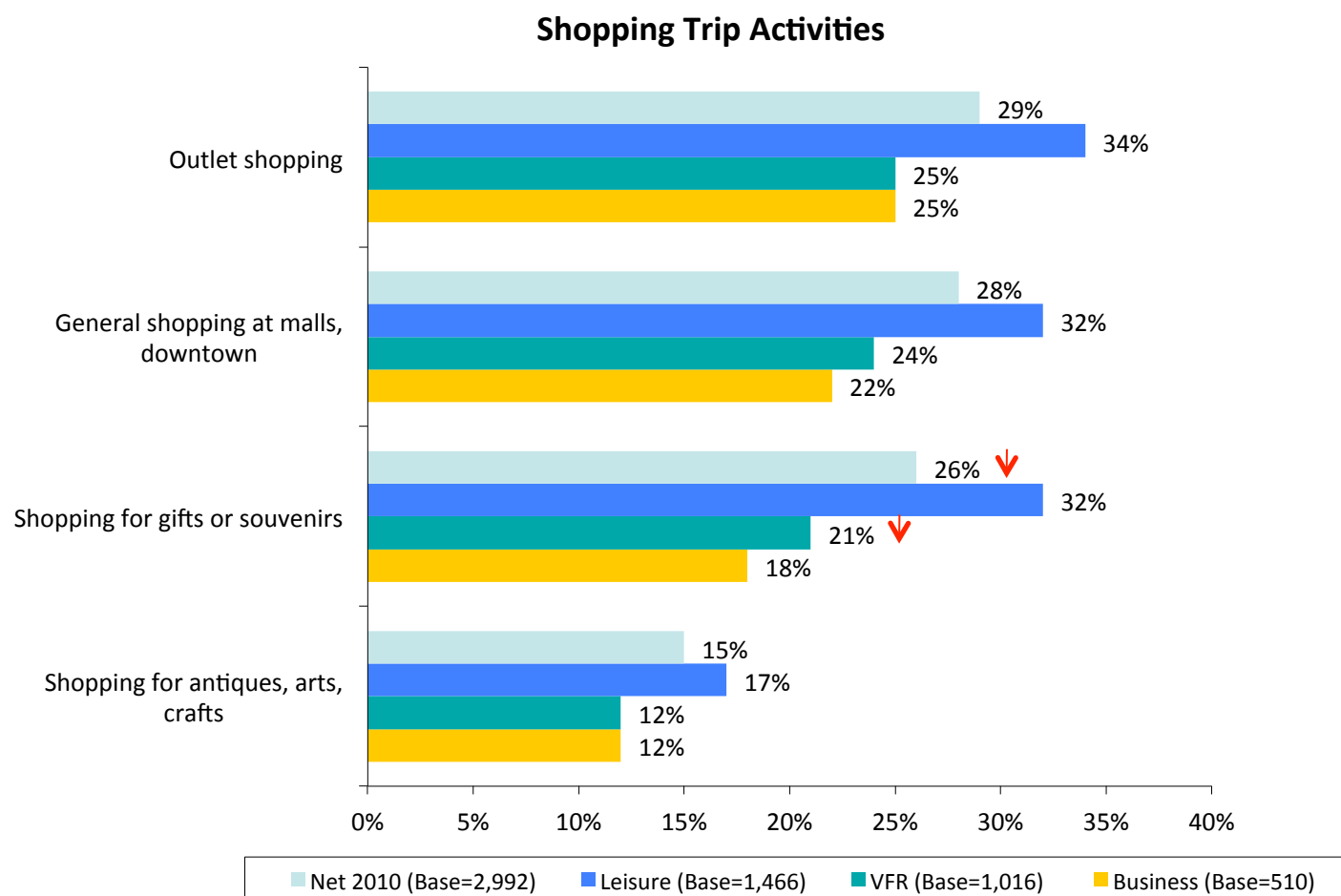
Trip Activities

- A few declines are seen versus a year ago on some lesser utilized activities.



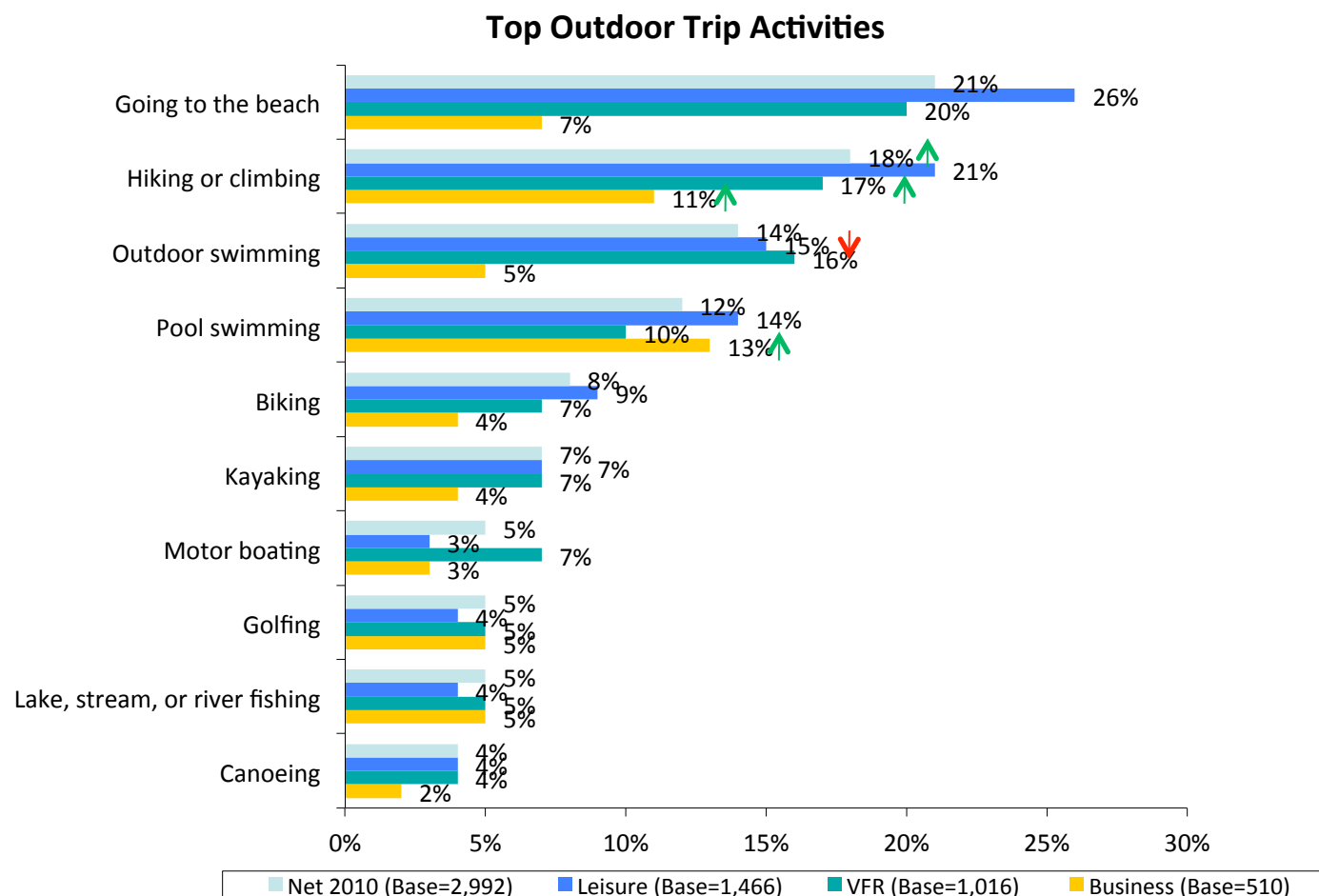
Trip Activities - Shopping

- There were year over year declines in shopping for gifts and souvenirs among Maine overnight visitors.



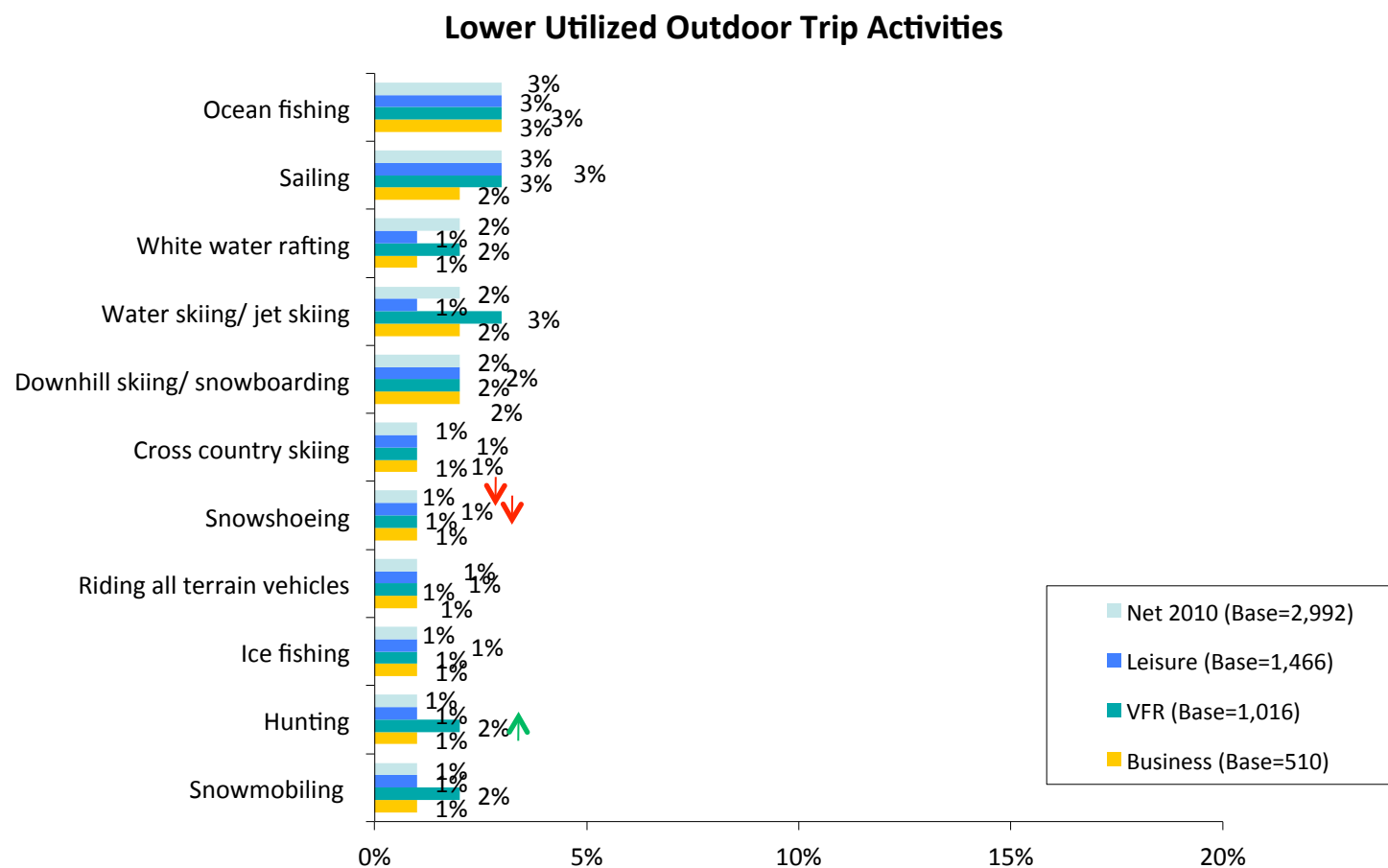
Trip Activities – Outdoor Activities

- Overnight visitors to Maine in 2010 enjoyed a variety of outdoor activities, with many going to the beach. Hiking or climbing was also popular, and saw an increase over 2009.



Trip Activities – Outdoor Activities

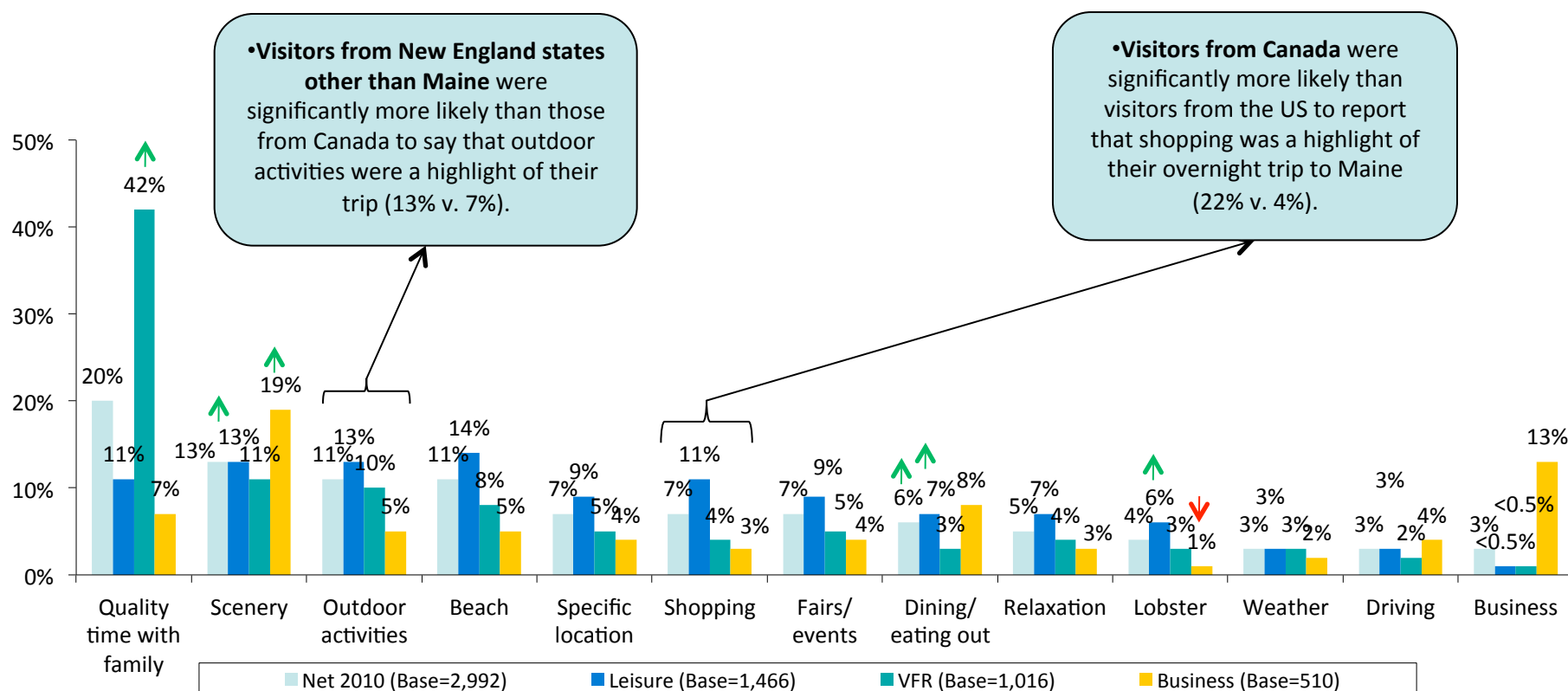
- Fewer travelers reported that they snow shod in Maine in 2010, but more VFR travelers stated that they hunted in the state.



Highlight of Trip to Maine

- Visitors recall a variety of highlights of their trip to the state. Notably, significant year-over-year increases were reported in the percent of overnight visitors to Maine who felt that scenery or dining was a highlight of their visit.

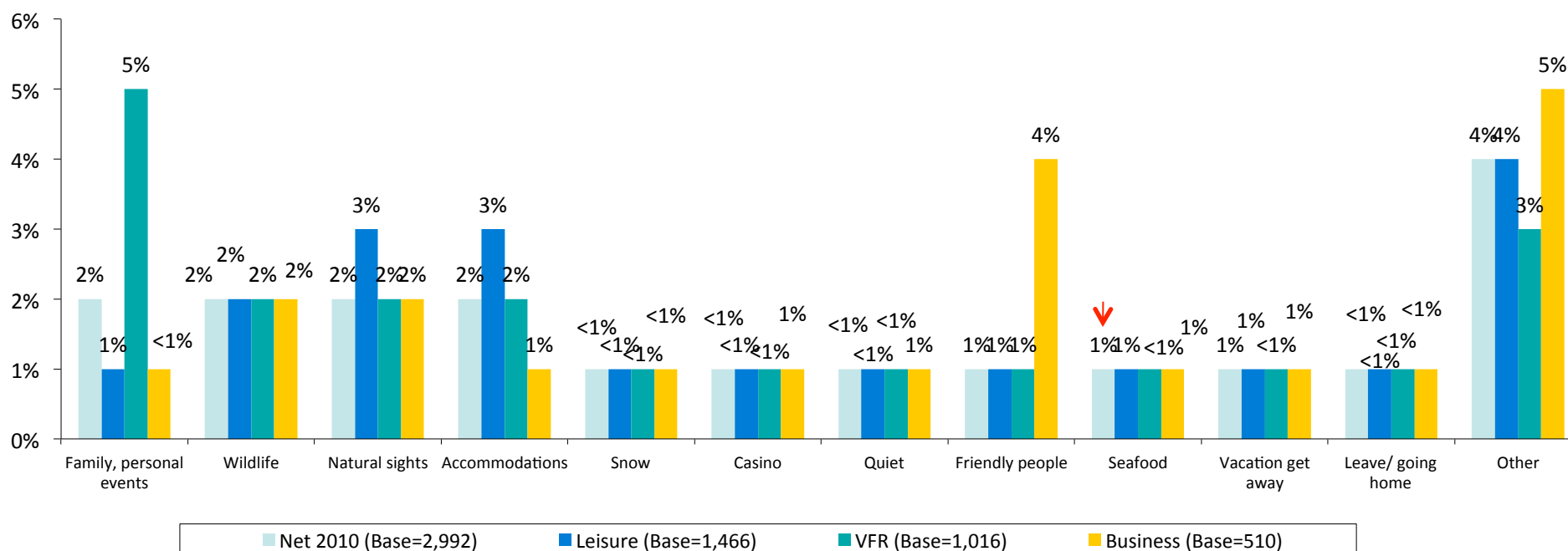
Highlight of Overnight Trip to Maine



Highlight of Trip to Maine - Continued

- A number of other items were also noted, but by fewer respondents, as highlights of their trip to Maine.

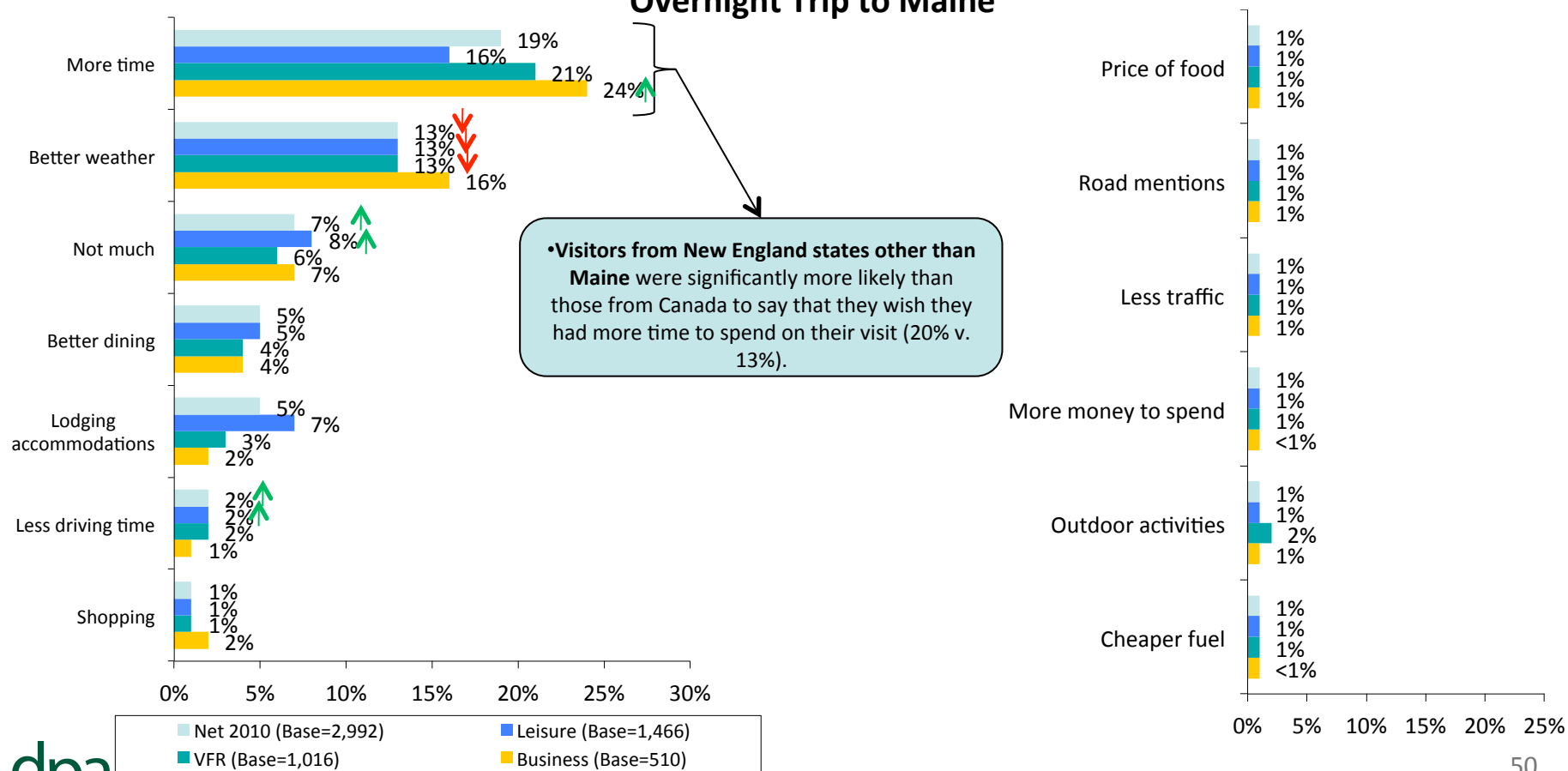
Highlight of Overnight Trip to Maine



What Could Have Been Better on Trip to Maine

- There was a decrease in the percentage of overnight visitors who reported that the weather could have been better when they came to Maine, likely a result of improved weather conditions in the peak summer season. Also, positively, there was an increase in those saying 'not much' could have been better about their trip.

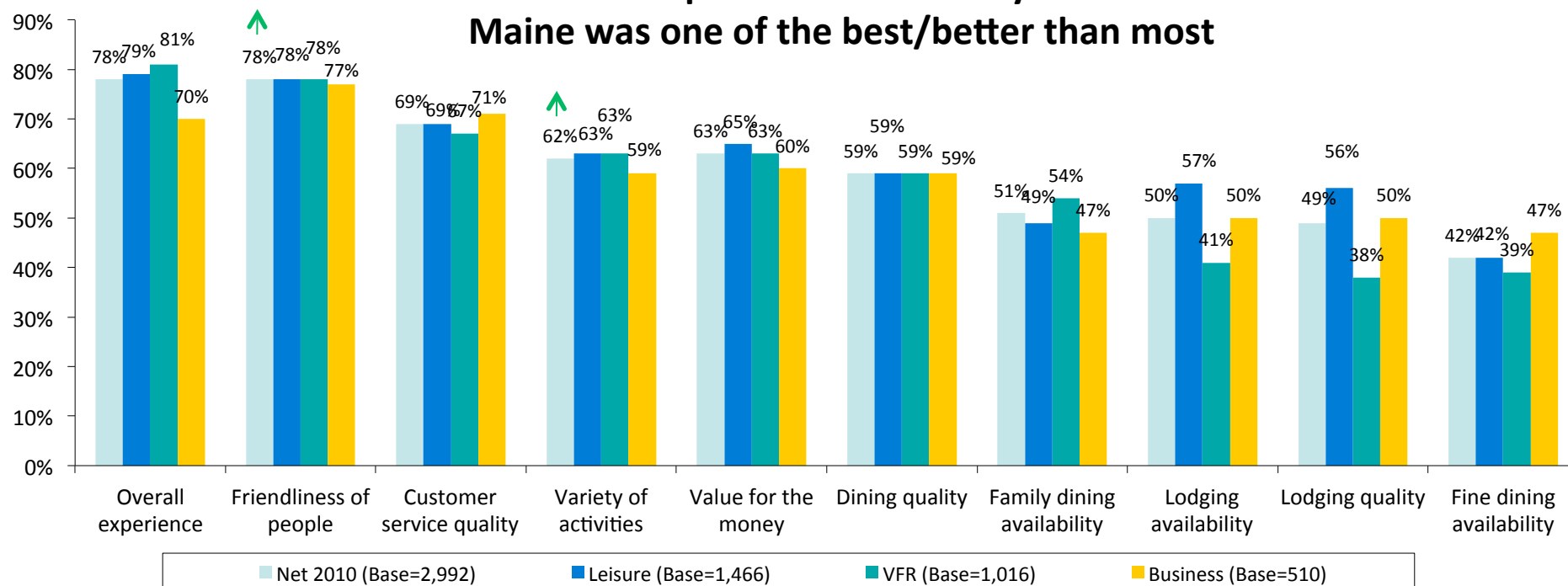
What Could Have Been Better on Overnight Trip to Maine



Comparison of Maine to Other Destinations

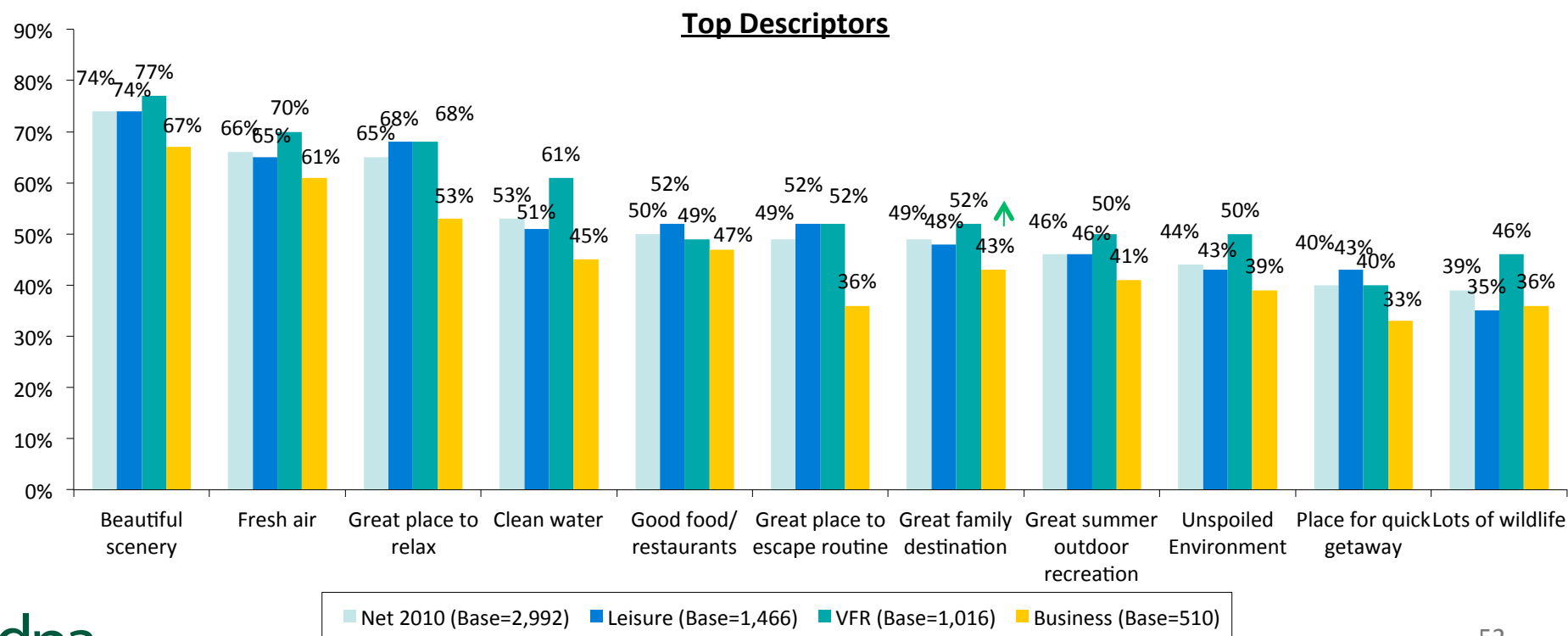
- There were relatively few significant year-over-year changes in the percentage of overnight visitors who ranked Maine as “one of the best” or “better than most other destinations” on a variety of attributes.
- However, significant increases were seen among travelers who were positive towards Maine’s friendliness of the people and in the variety of activities available.

Top Two Box Summary: Maine was one of the best/better than most



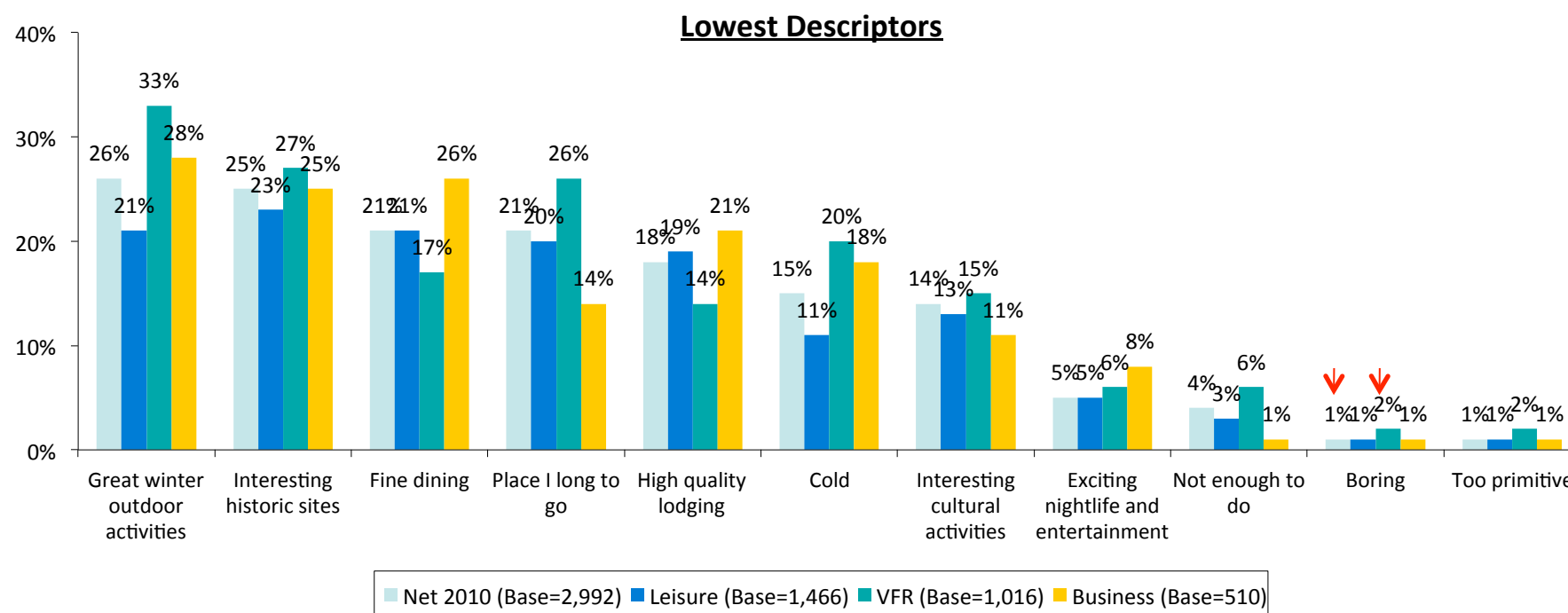
Phrases that Best Describe Maine - Overnight Visitors

- In a similar pattern to the previous slide, there were relatively few significant year-over-year changes in the percent of overnight visitors who used the following phrases to describe Maine. One exception was a significant year-over-year increase in overnight business travelers who reported that *great family destination* as a phrase that describes the state.



Phrases that Best Describe Maine

- The phrases that were least likely used to describe Maine by overnight visitors also saw statistical year-over-year stability between 2009 and 2010. Significant shifts did come with VFR overnight visitors, who were less likely to report that Maine is boring.
- Notably, great winter activities, interesting historic sites, fine dining and place I long to go are less associated with Maine.

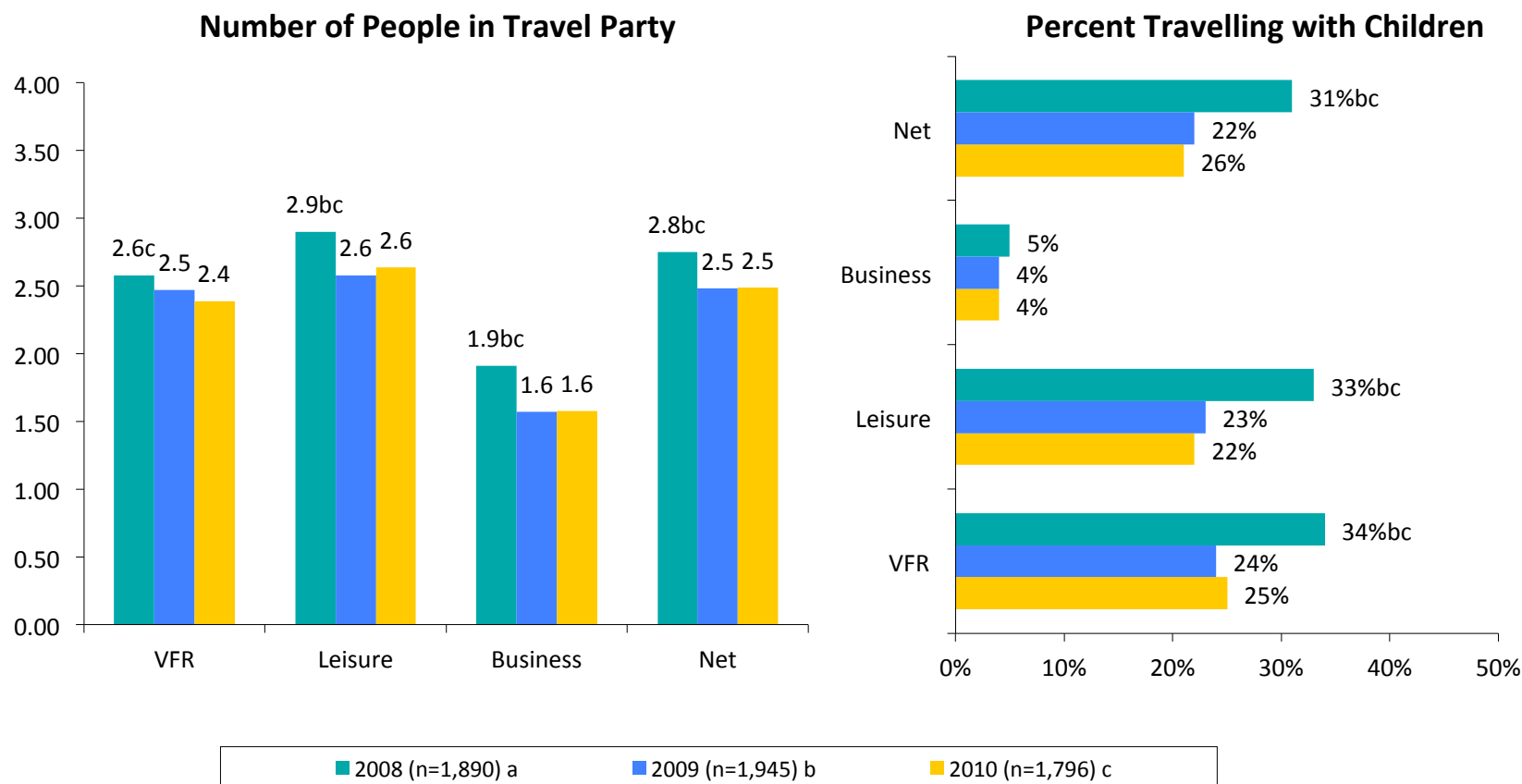


Day Visitor Travel Logistics



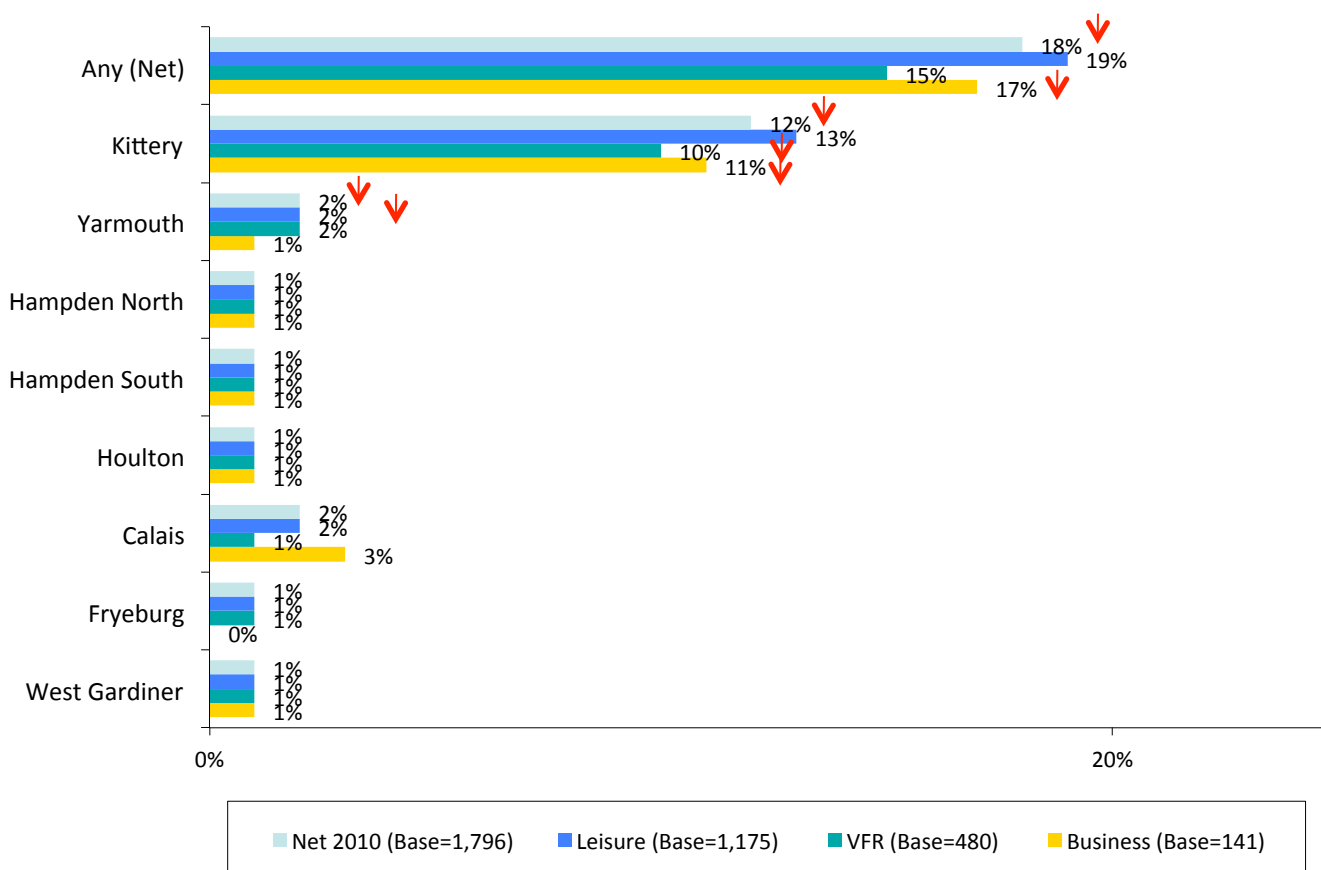
Travel Party Size and Composition

- As seen in 2009, day traveler party size remains down from 2008 levels, driven largely by fewer visitors traveling with children.



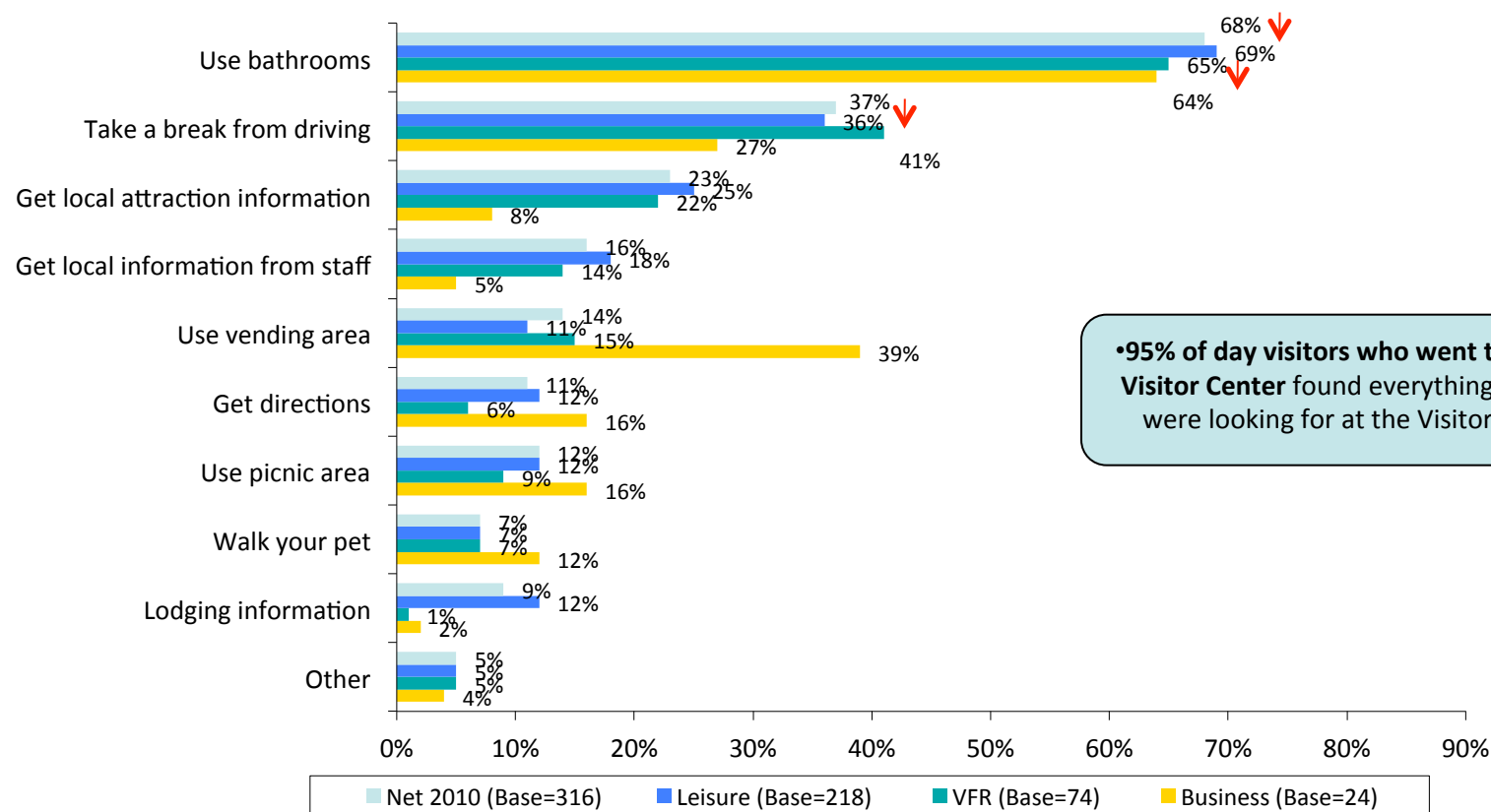
Visitor Center Usage While in Maine

- Approximately one in five day visitors to Maine went to a Maine Visitor Center during their trip. This is less than the percentage of overnight visitors to Maine who went to one of the Centers during their visit. In a similar pattern to overnight visitors, the most widely used Visitor Center was Kittery. Both Kittery and Yarmouth saw some day visitation decline in 2010.



Visitor Center Usage While in Maine

- Despite a year over year decrease, using the bathrooms is still the most popular use among day visitors who went to a Maine Visitor Center.



Day Q12b. What did you utilize the Maine Visitor Center(s) for during your visit?

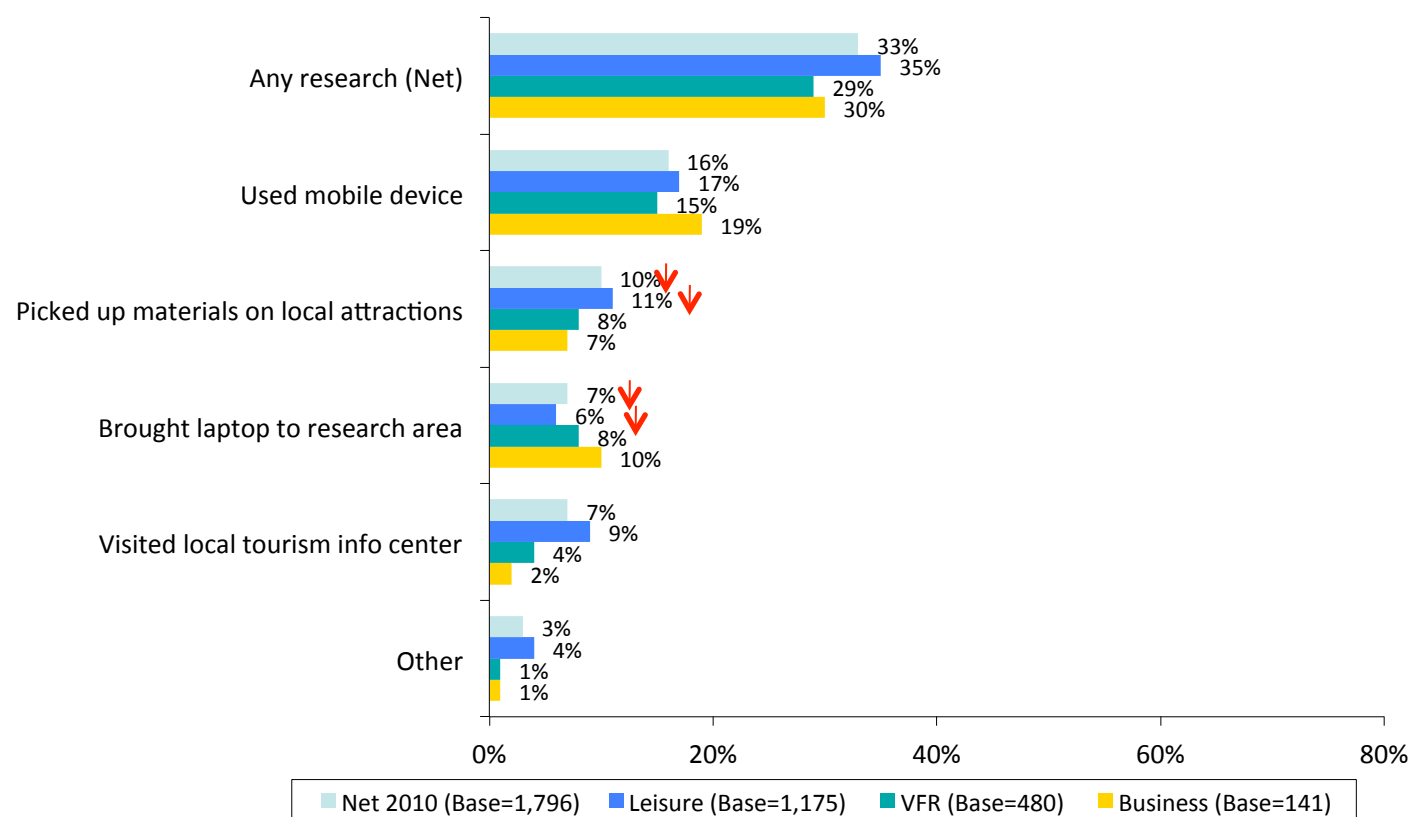
Day Q12c. Was there anything specific you were looking for at the Visitor Center that you could not find or wish was provided?

*Base less than 100, use for directional purposes only.

↑↓ notes significant year-over-year difference at 95% confidence level

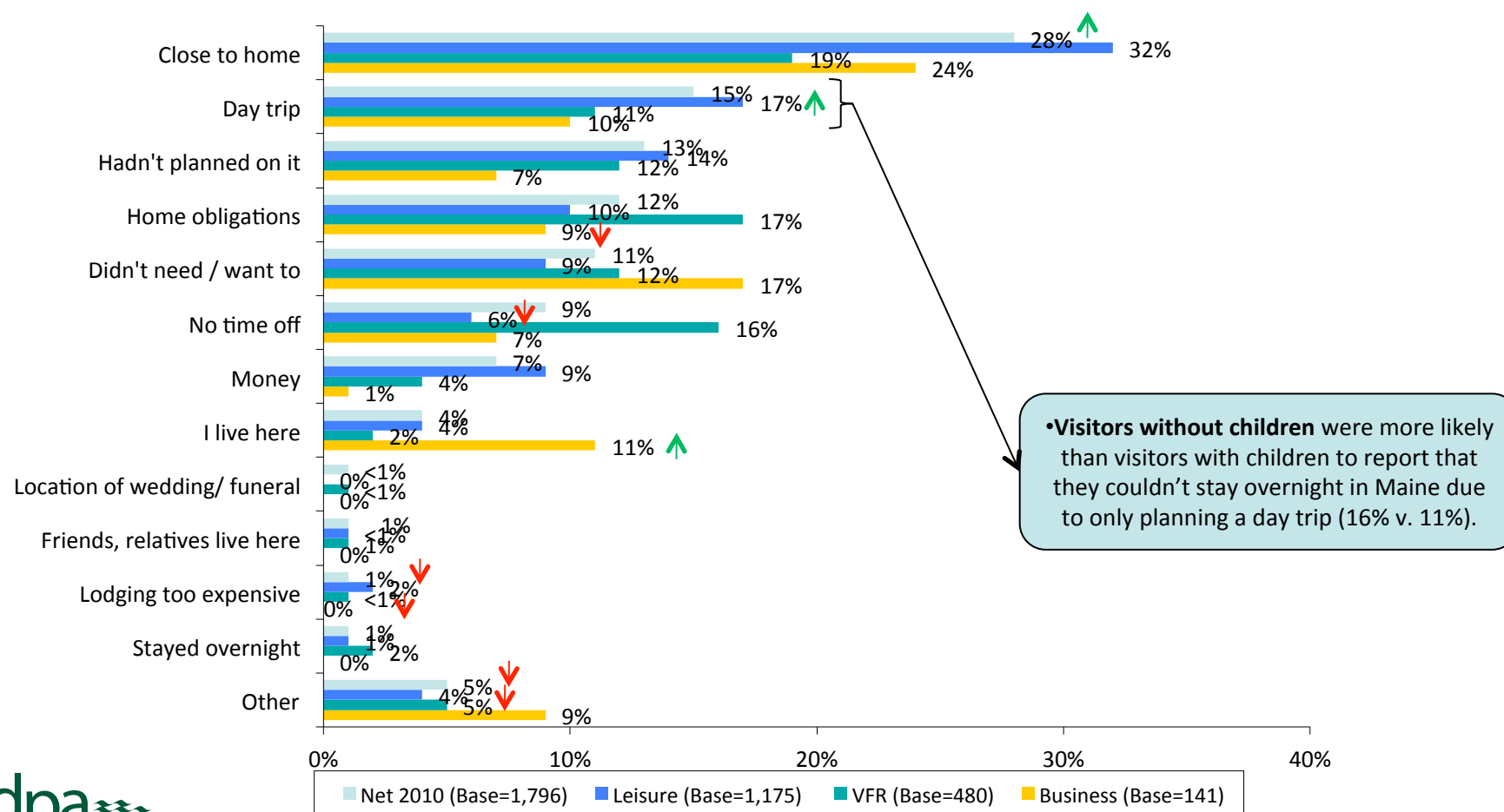
Trip Research While in Maine

- Slightly more than one-third of day visitors to Maine reported that they conducted research during their visit, which is less than the level reported by overnight visitors.
- Fewer day visitors are picking up materials or bringing their laptops. A good portion use mobile devices to gather information.



Why Day Visitors Did Not Stay Overnight

- When day visitors were asked why they did not spend the night in Maine, more than one-quarter reported that they didn't spend the night because it was close to home. This percentage was a significant increase compared to 2009.

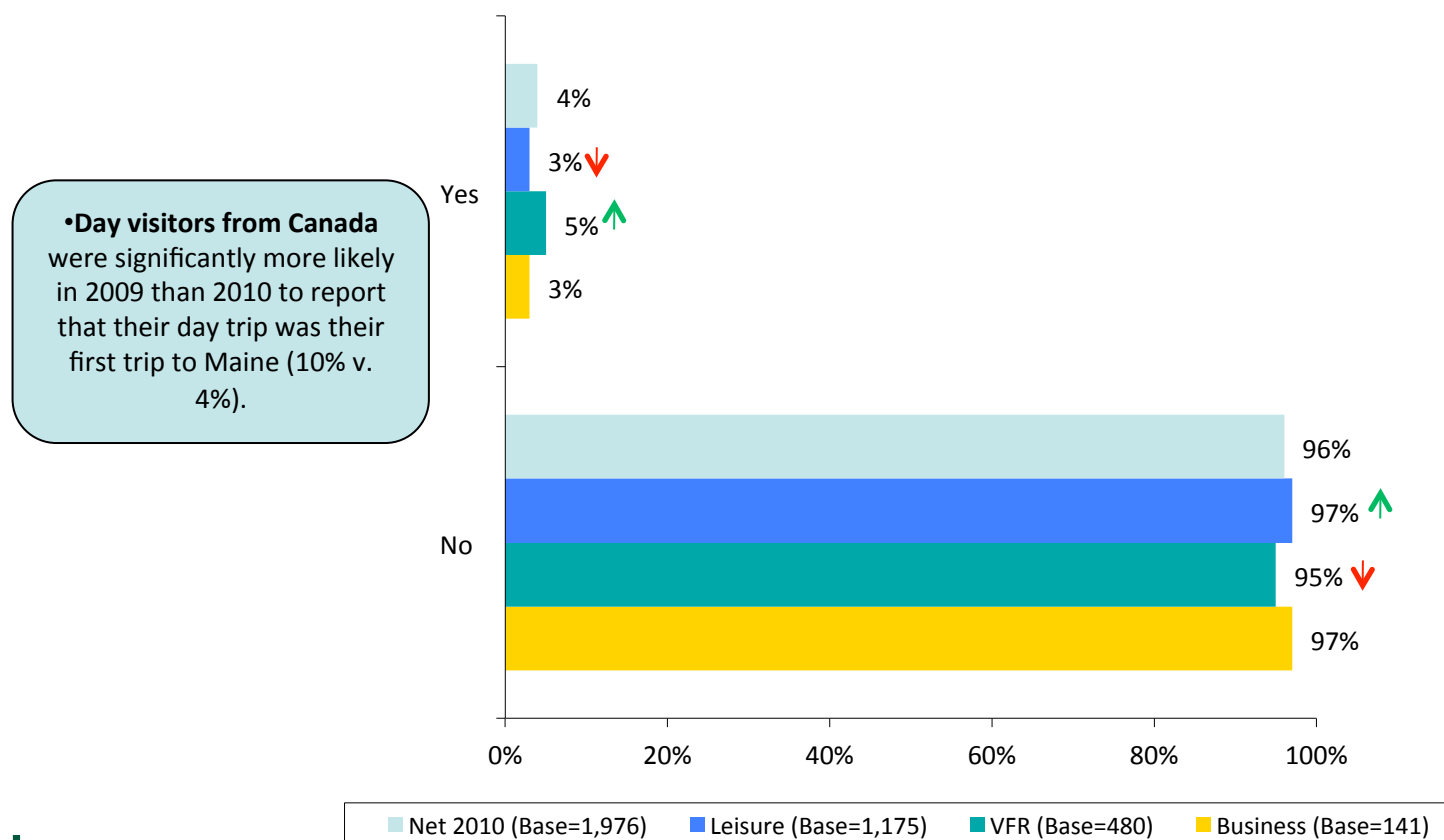


The Maine Day Visitor Experience



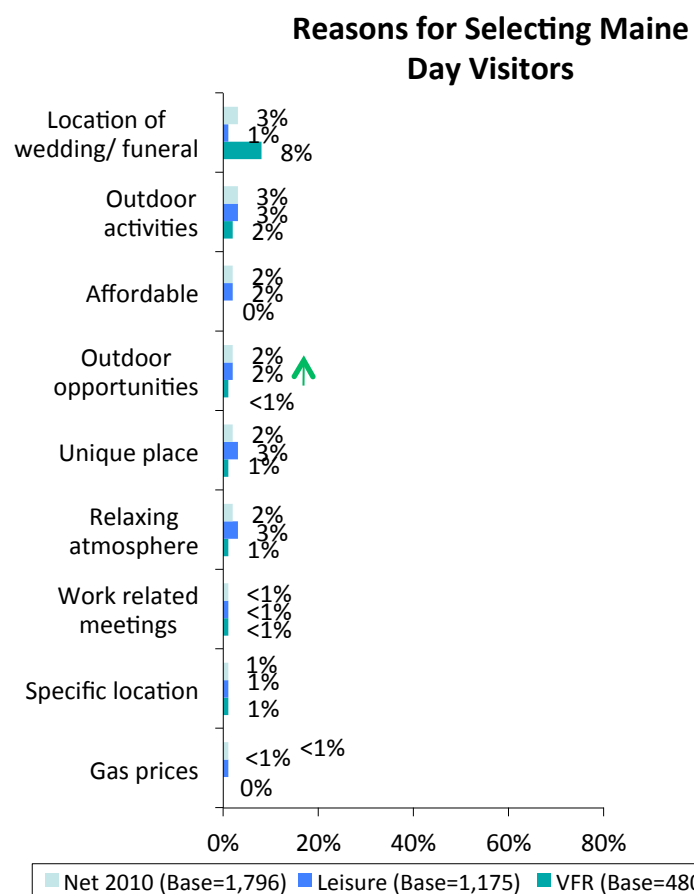
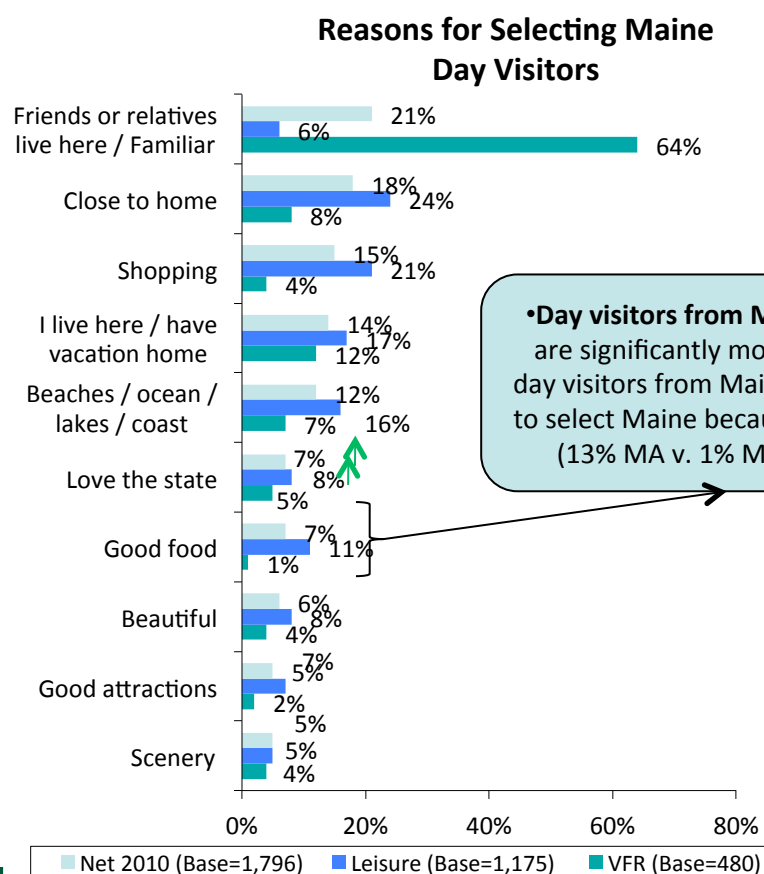
Repeat versus First-Time Visitors

- Day visitors are more likely than overnight visitors to be repeat visitors to Maine. In fact, more than nine-in-ten day visitors reported that they have been to Maine before.
- However, it's notable to mention that there was a significant year-over-year increase in the percent of VFR day visitors who reported that it was their first trip to Maine. After an increase in 2009, leisure first time visitors fell back to the 2009 level.



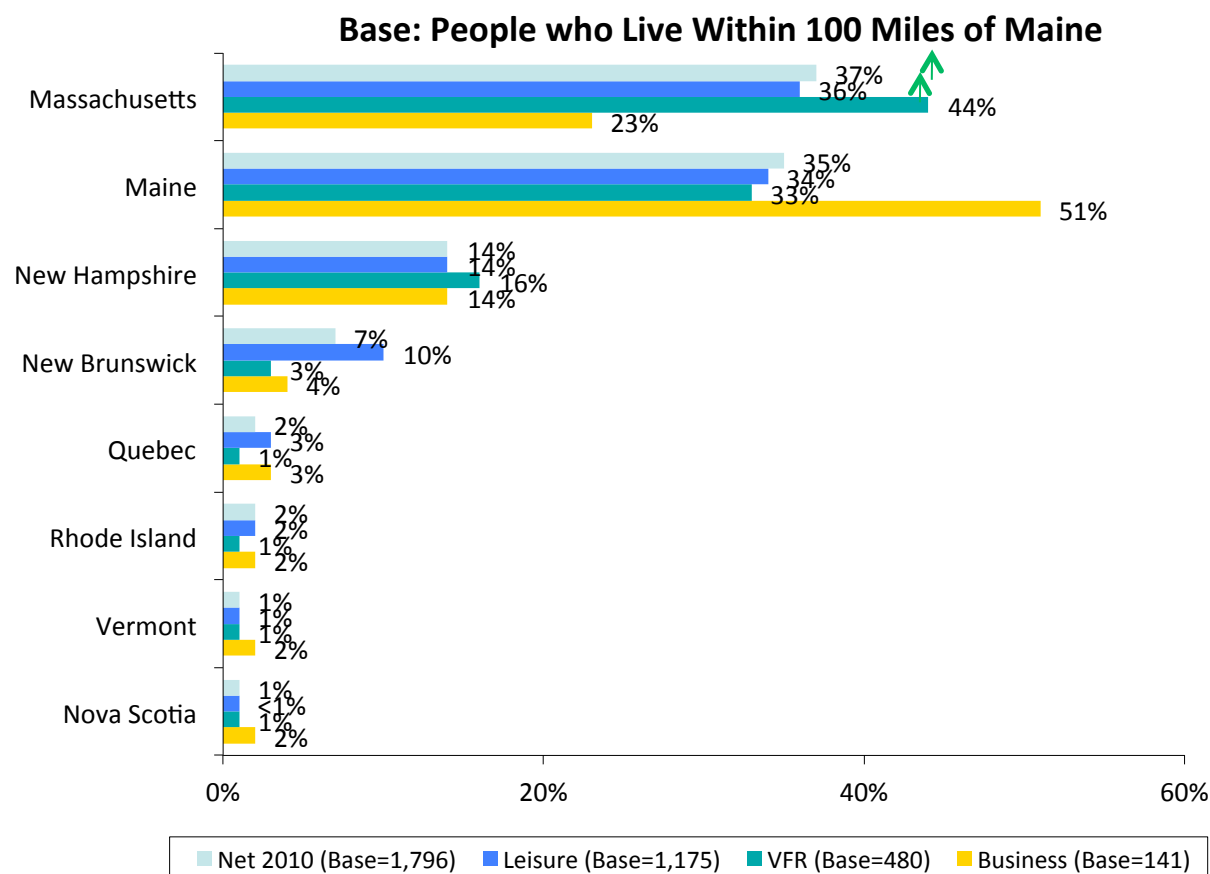
Reasons for Selecting Maine by Trip Type: Day Visitors*

- There was a significant year-over-year increase in the percentage of day visitors who selected Maine because they love the state. This increase is driven by leisure day visitors and demonstrates the positive feelings leisure visitors to Maine have.



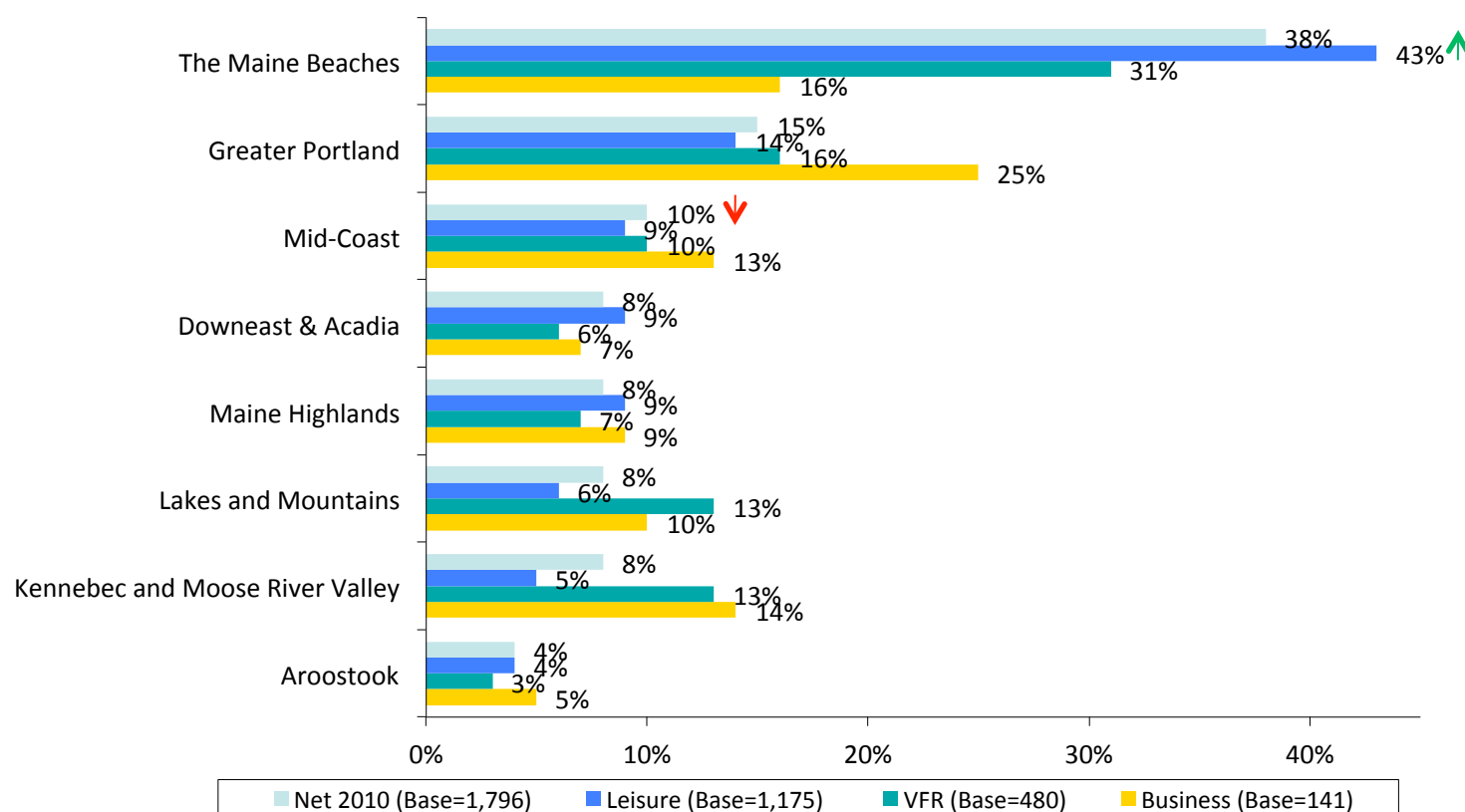
Residence of Maine Day Visitors

- The percentage of day visitors from Massachusetts has increased over a year ago, with Massachusetts residents providing a similar proportion of day visitors as from Maine.



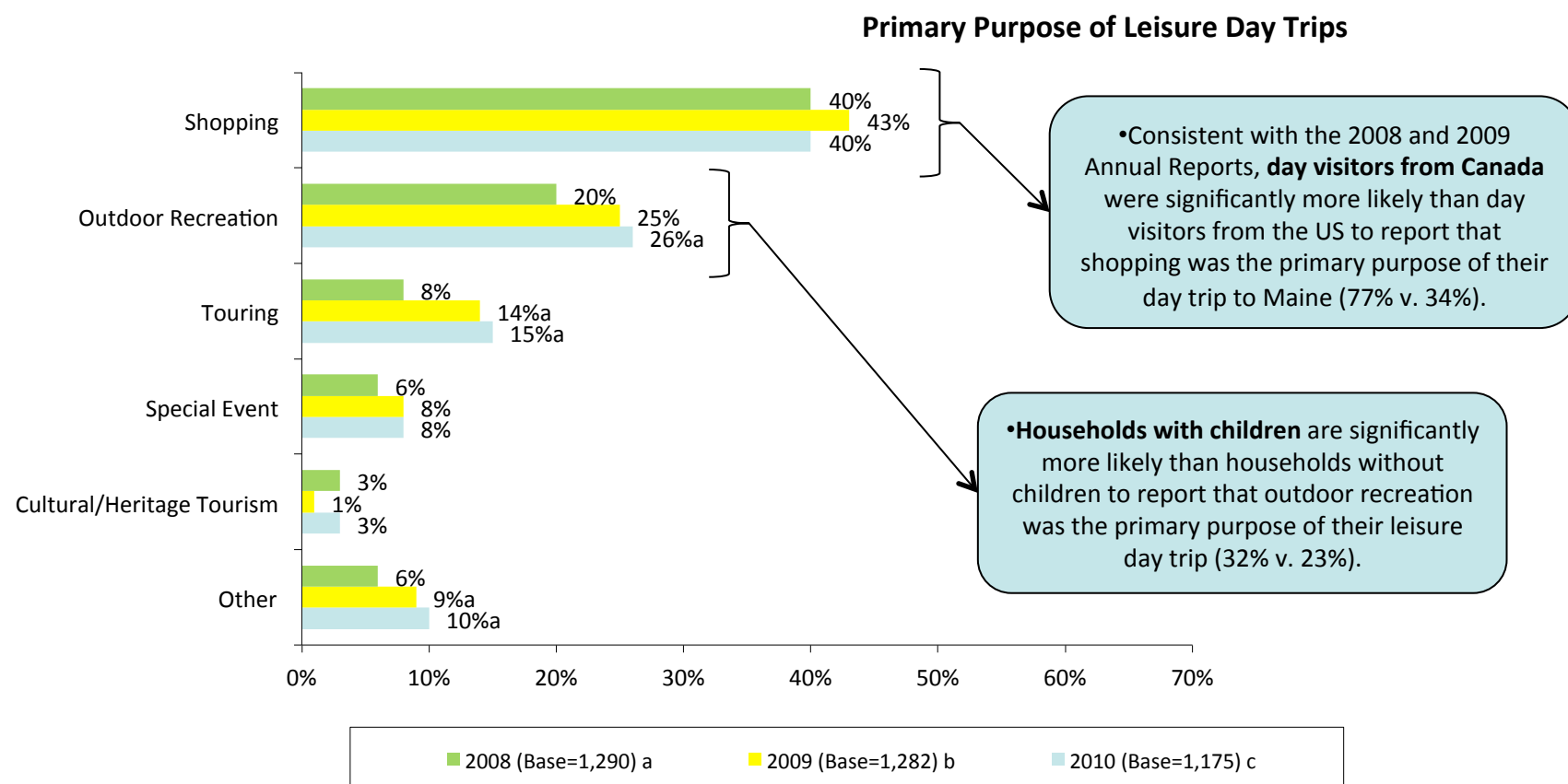
Primary Region by Trip Type: Day Visitors

- Slightly more than one-third of day visitors to Maine went to the Southern Maine Coast during their visit, twice the percentage of the second most visited region -- Greater Portland. Furthermore, the percentage of leisure day visitors to the Southern Maine Coast saw a significant year-over-year increase compared to the same period last year.



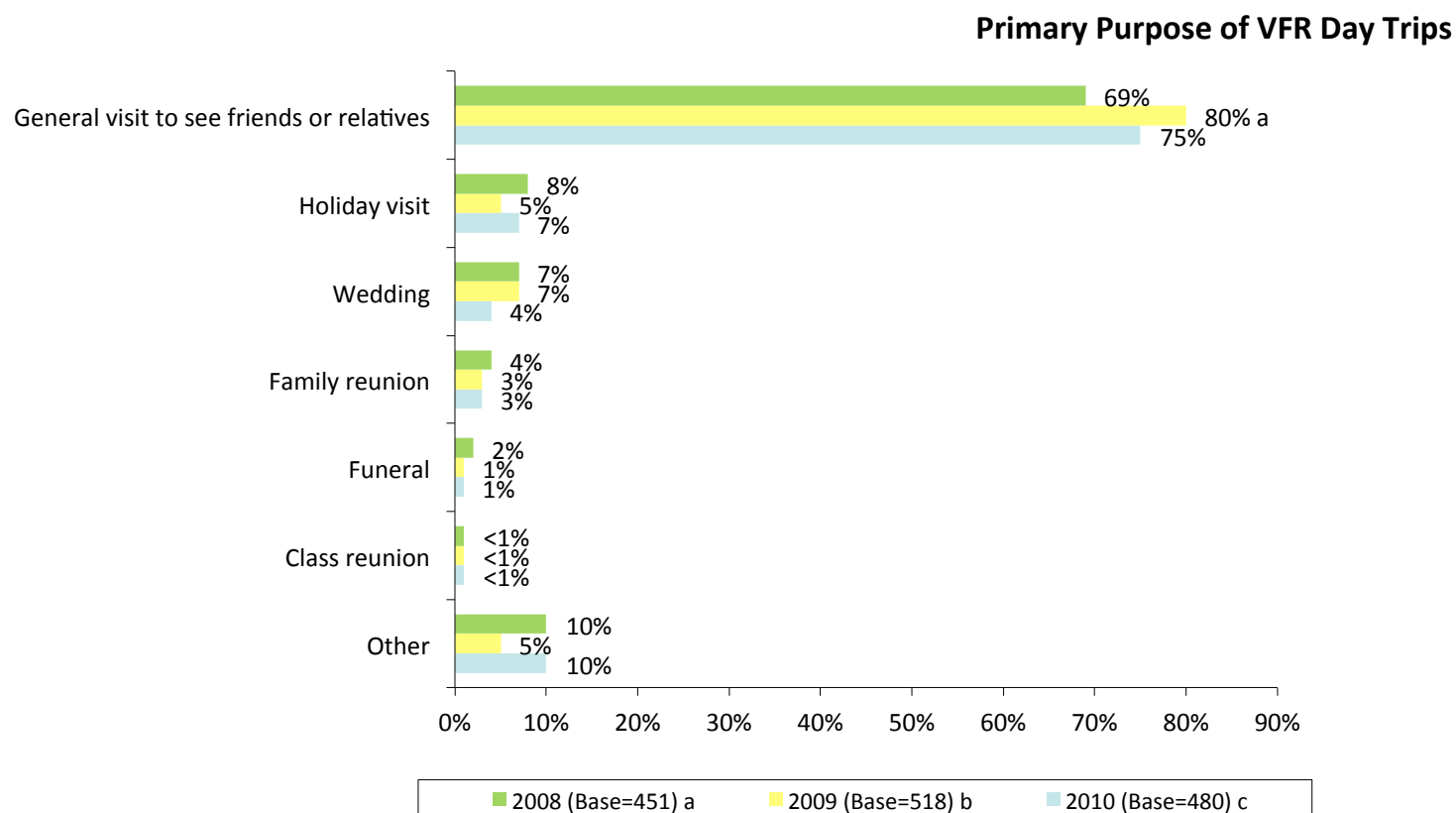
Primary Purpose of Leisure Day Trips

- Nearly half of leisure day visitors to Maine reported that shopping was the primary purpose of their trip, a figure that was statistically stable with the same time period in 2009.



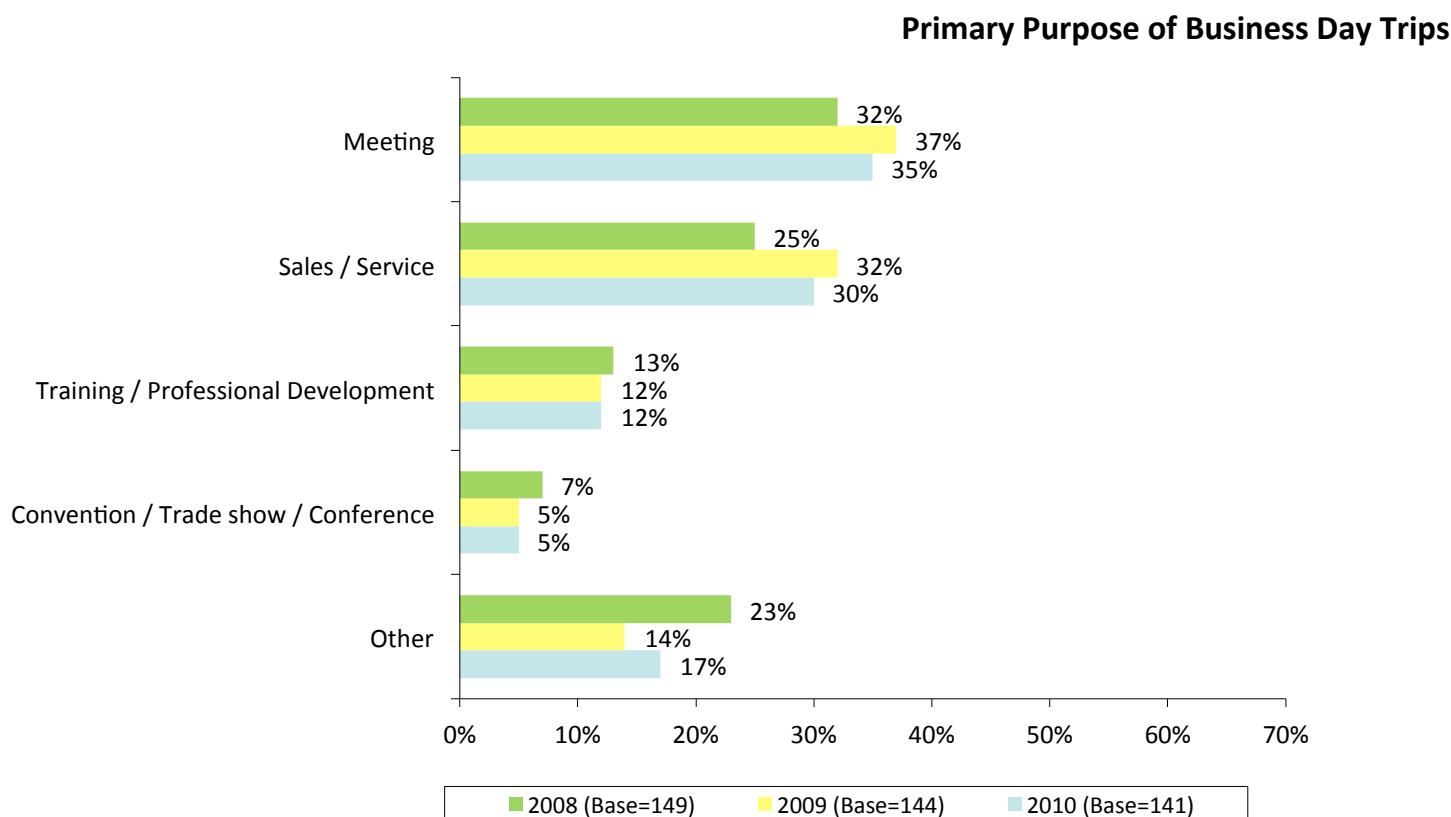
Primary Purpose of VFR Day Trips

- More than three-quarters of VFR day trips to Maine are general trips to see friends or relatives. Other VFR day trip purposes -- holiday visits, weddings, reunions, and funerals, also remained statistically consistent with last year.



Primary Purpose of Business Day Trips

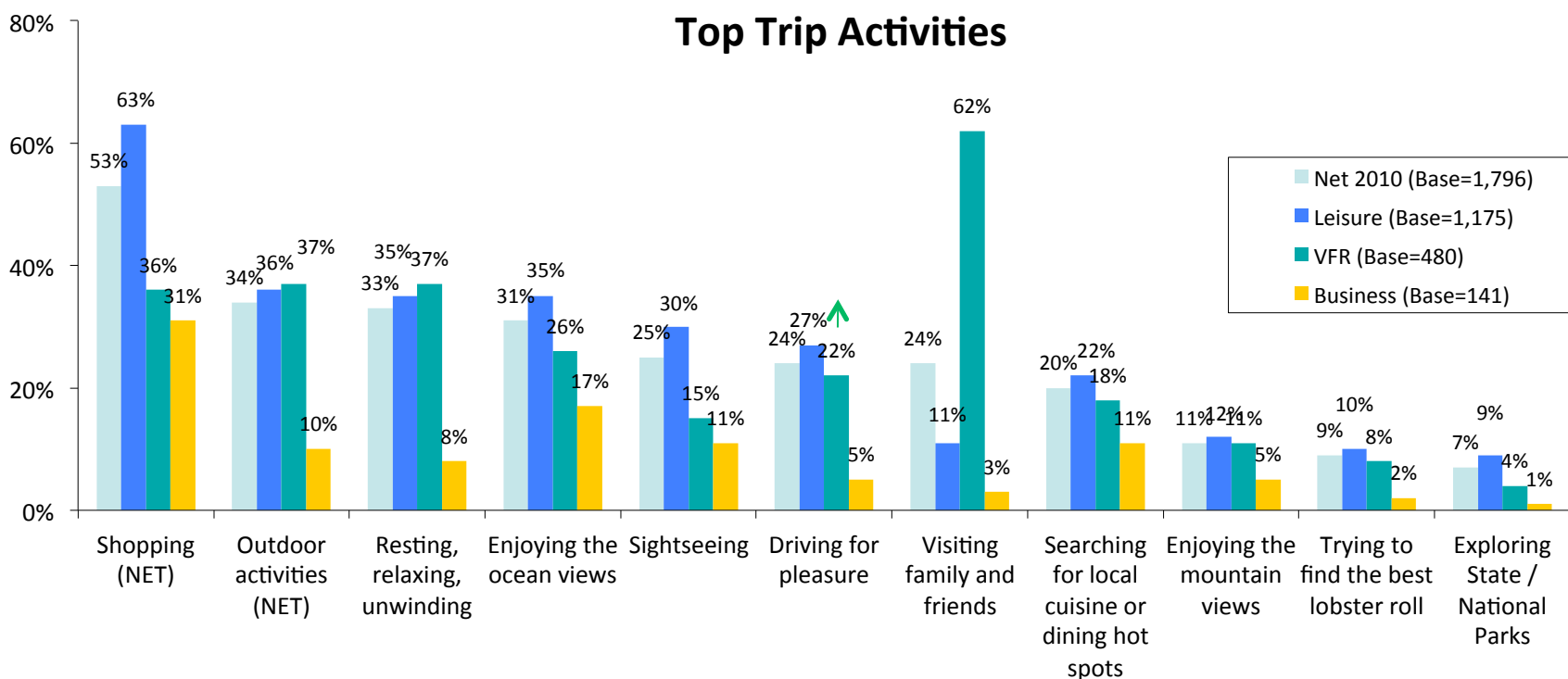
- Slightly more than one-third of business day visitors to Maine reported that they came to Maine for a meeting, while just under one-third came to Maine for sales or service. Both of these percentages reflect statistical stability with the same time period in prior years. In fact, there were no statistically significant year-over-year changes in the primary purpose of day business trips to Maine between 2009 and 2010.



Day Visitor Activities by Trip Type

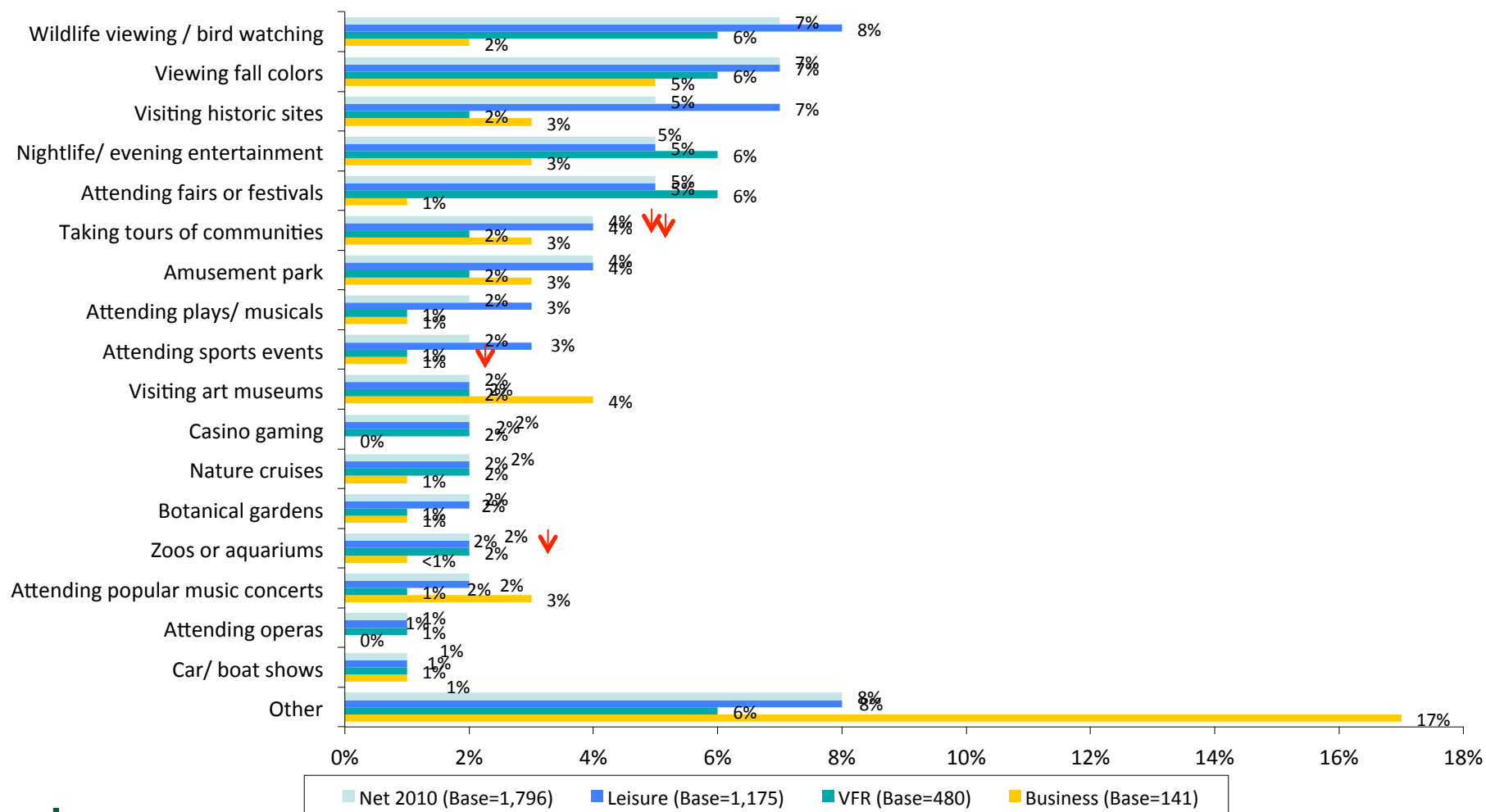
- Shopping continues to be the most popular activity among day visitors, followed by outdoor activities and resting, relaxing, and unwinding.

• **Day visitors from the US** are significantly more likely than day visitors from Canada to go to the beach, swim outdoors or go kayaking.



Day Visitor Activities by Trip Type - Continued

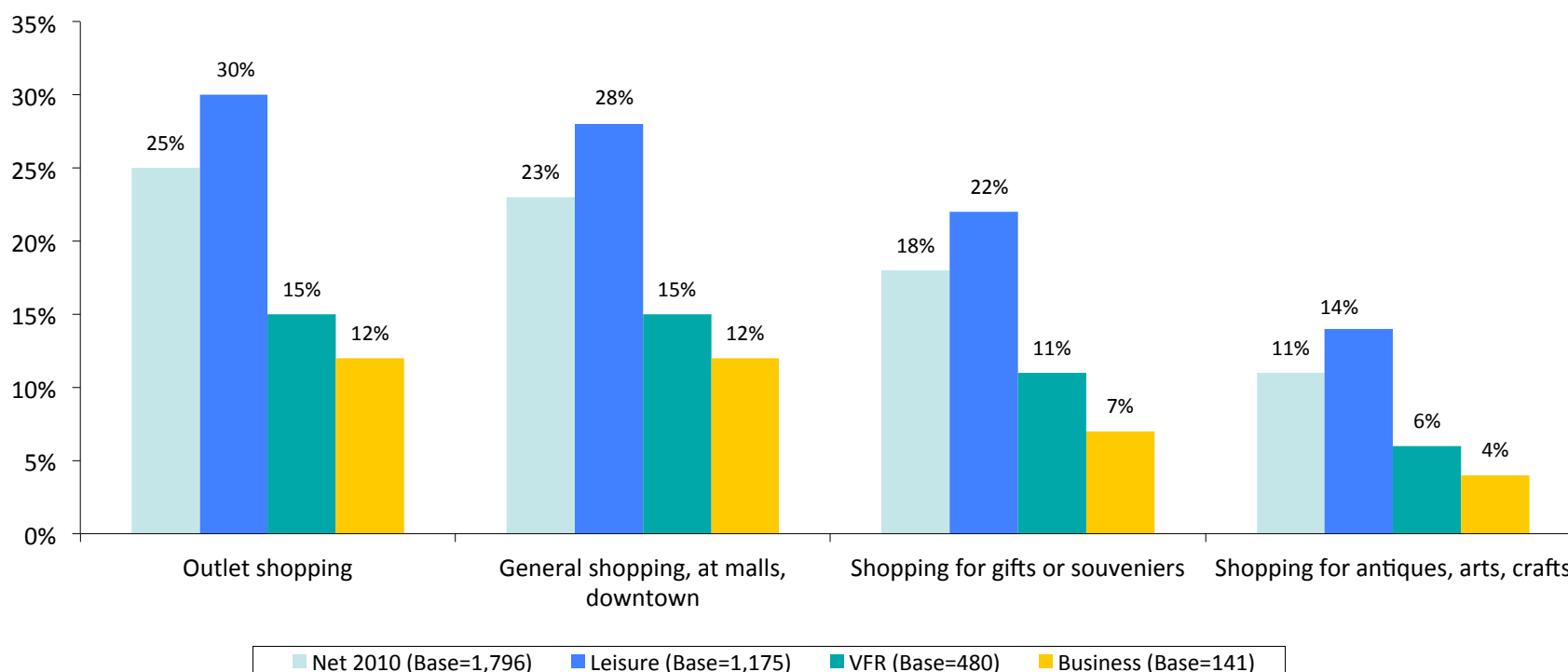
Lower Utilized Trip Activities



Day Visitor Activities - Shopping

- Day visitors to Maine continued to take advantage of Maine's shopping opportunities with a focus on outlet shopping and general shopping at malls and downtown areas.

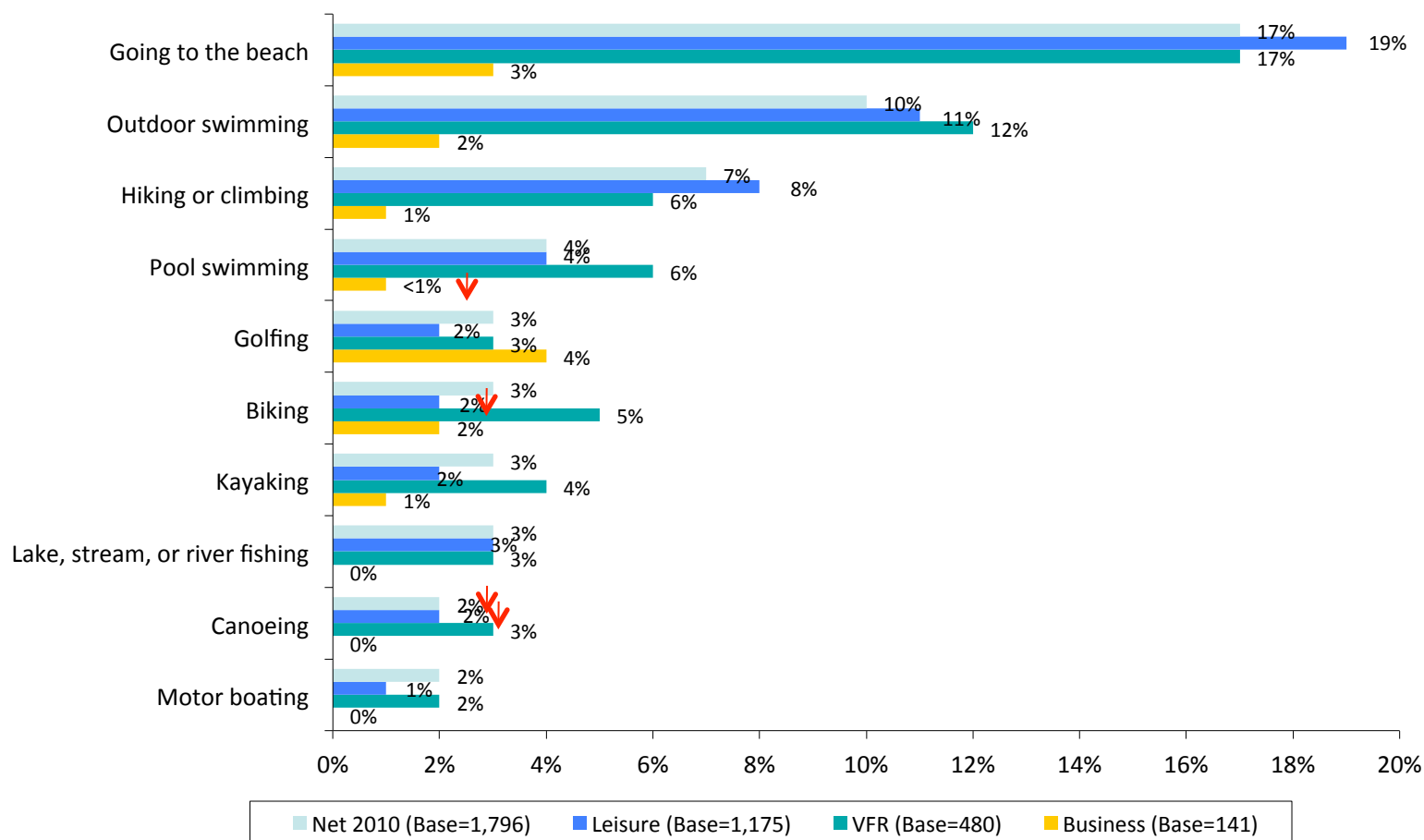
Shopping Trip Activities



Day Visitor Activities – Outdoor Activities

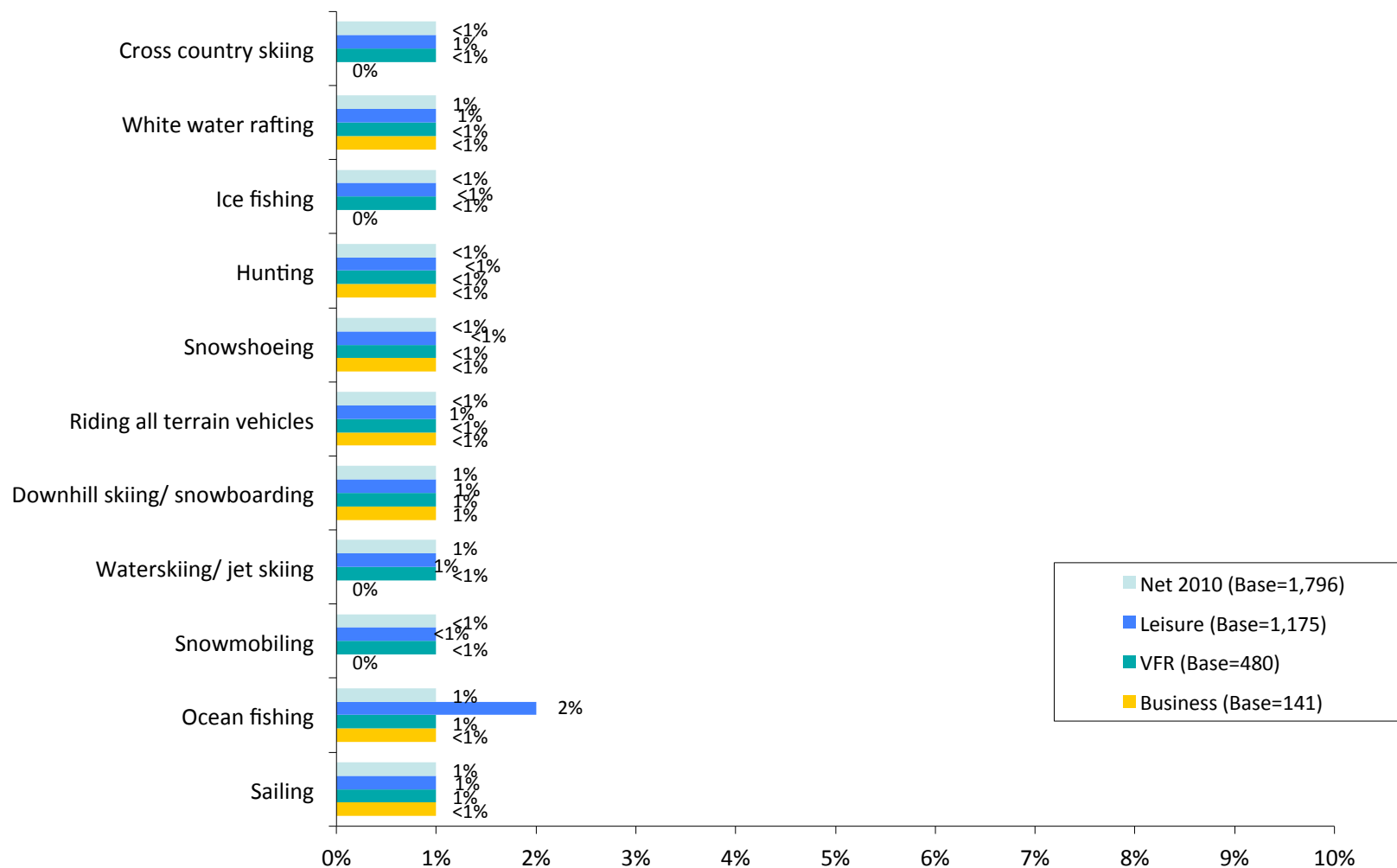
- Among outdoor activities, Maine Day visitors enjoyed going to the beach and swimming, as well as hiking and climbing. Canoeing saw a decline over year ago.

Top Outdoor Trip Activities



Day Visitor Activities – Outdoor Activities (Cont.)

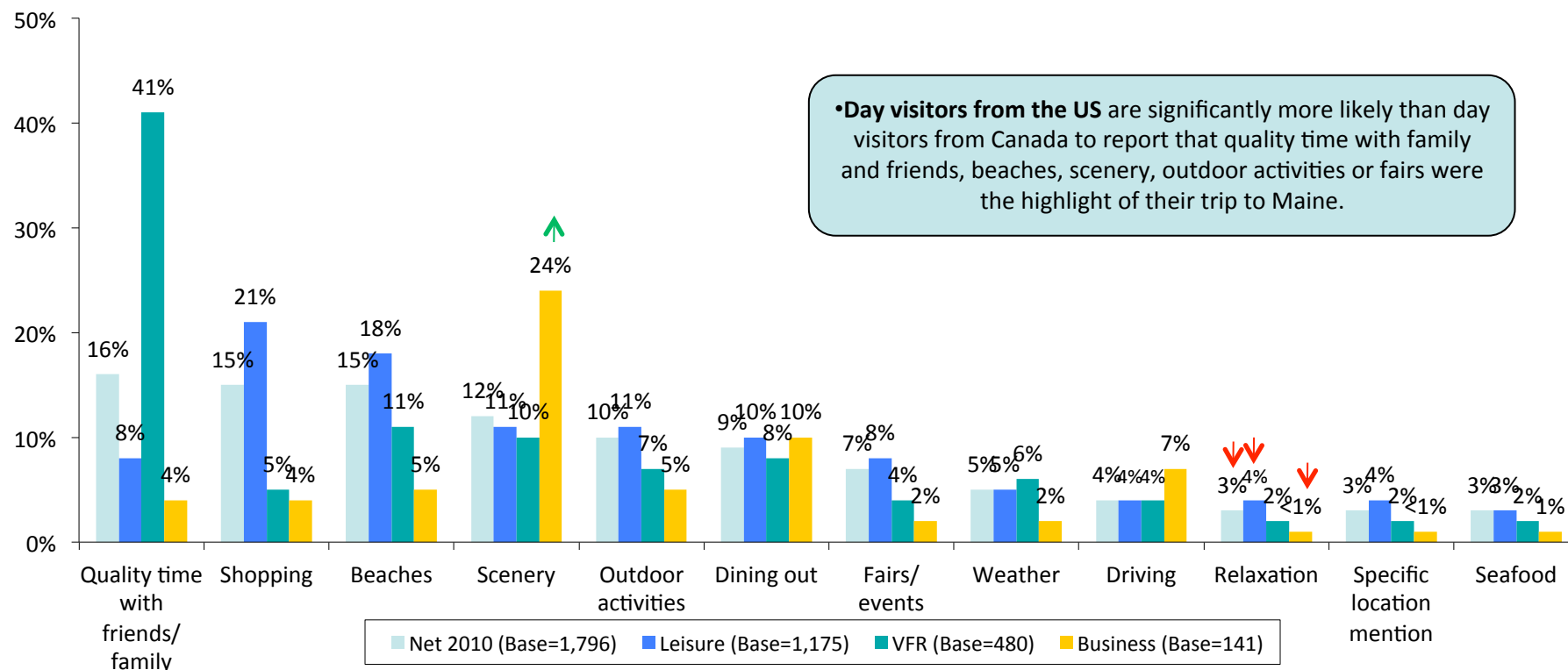
Lower Utilized Outdoor Trip Activities



Highlight of Trip to Maine

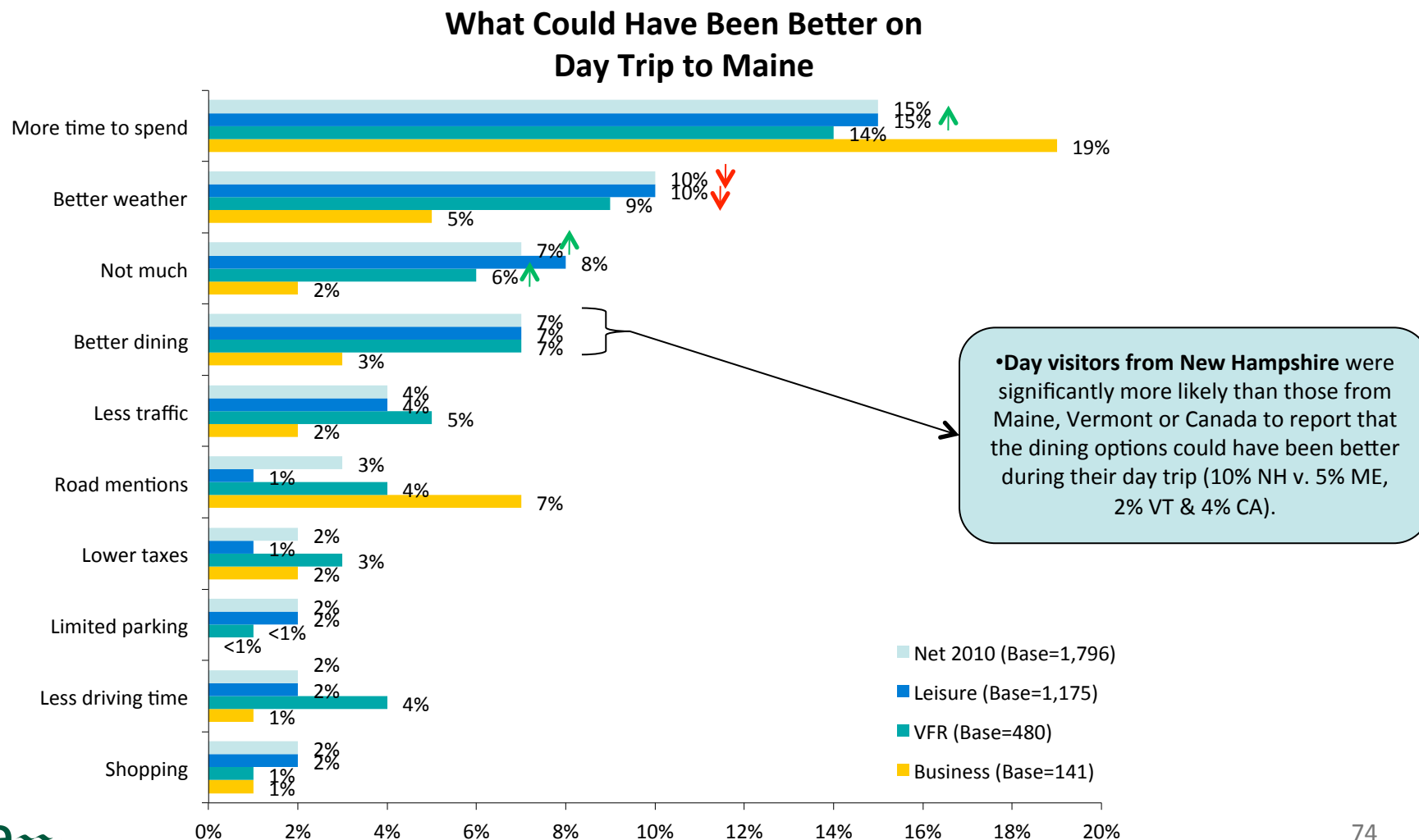
- Day visitors to Maine continue to report shopping, quality time with friends/family and outdoor activities as highlights of their trip. Interestingly, business travelers seem to quite enjoy the scenery offered by a Maine business trip.

Highlight of Day Trip to Maine



What Could Have Been Better on Trip to Maine

- As was seen with overnight visitors, 2010 day visitors were significantly less likely to complain about the weather as compared to 2009. Additionally, there were more mentions of 'not much' in 2010 than were seen in 2009.

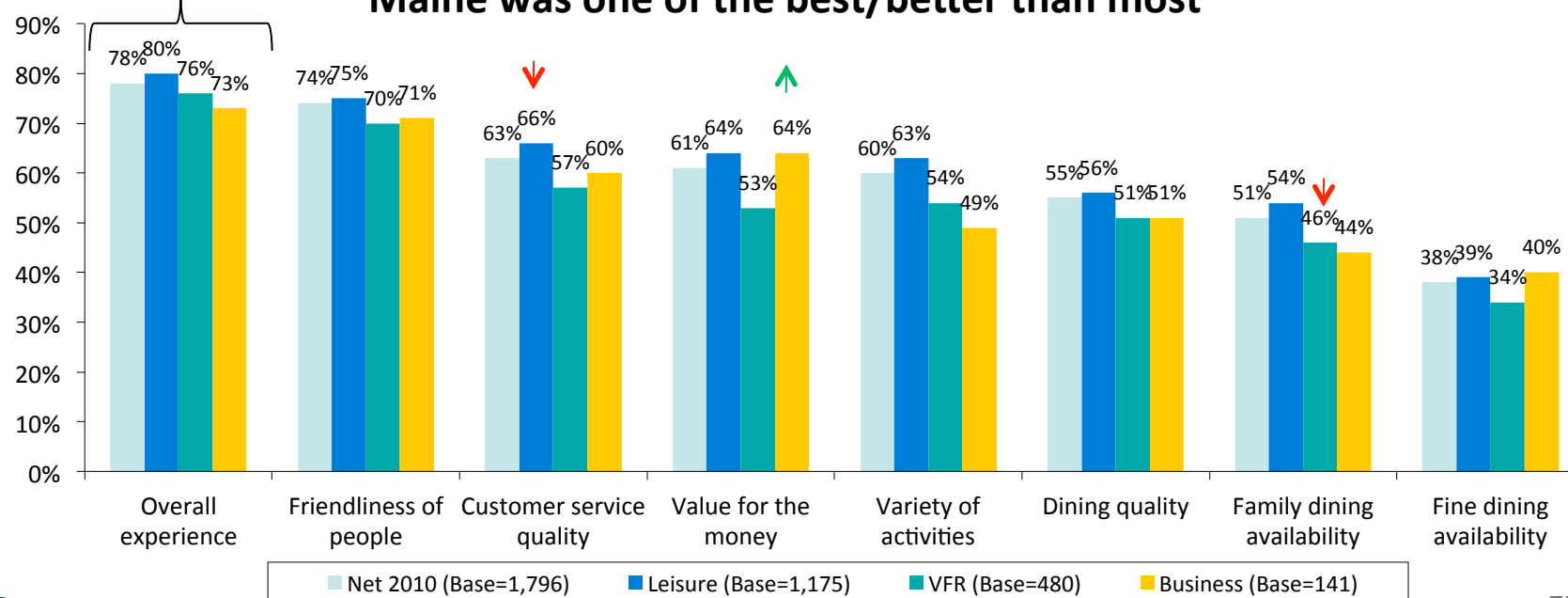


Day Visitor Comparison of Maine to Other Destinations

- Day visitors continue to see Maine's strength as a destination, rating particularly well the overall experience and friendliness of the people.

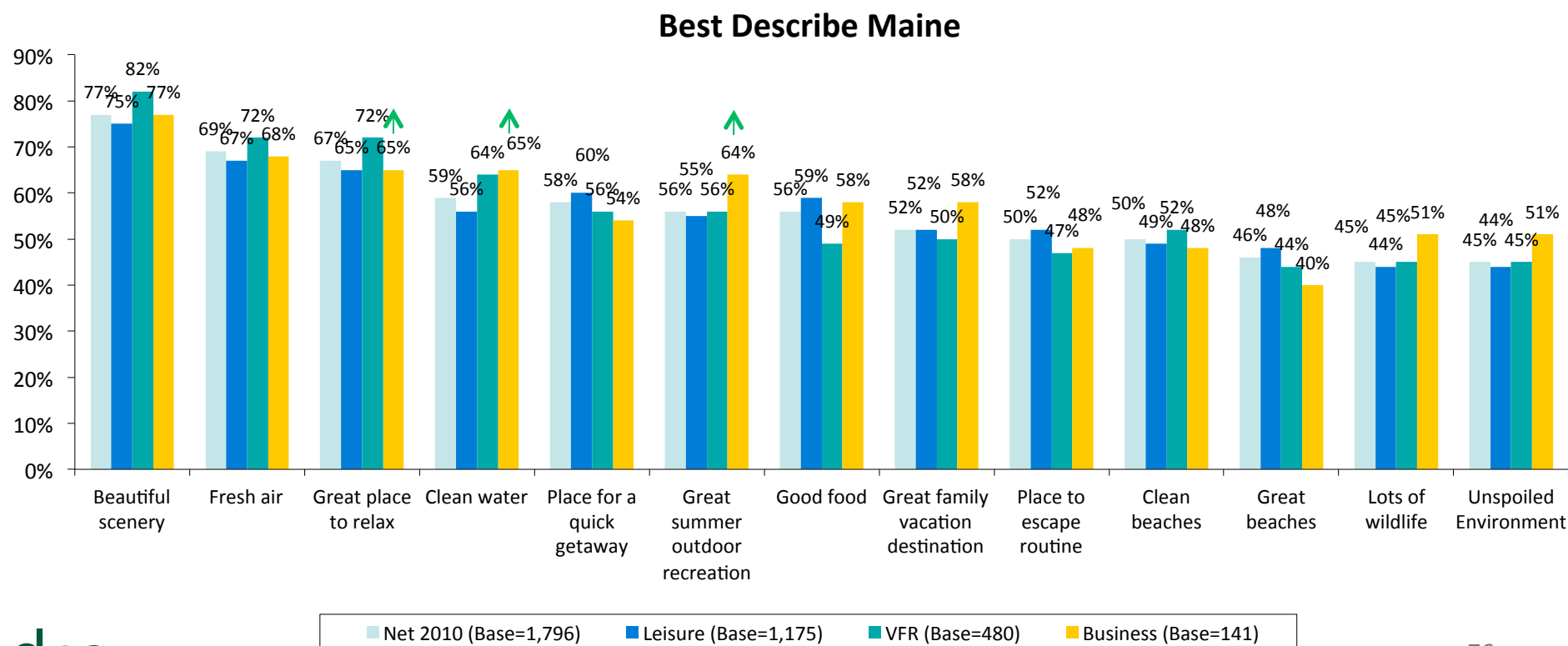
• **Day visitors without children** were significantly more likely than day visitors with children to report that the overall experience of their trip to Maine was one of the best or better than most other destinations (81% v. 70%).

Top Two Box Summary: Maine was one of the best/better than most



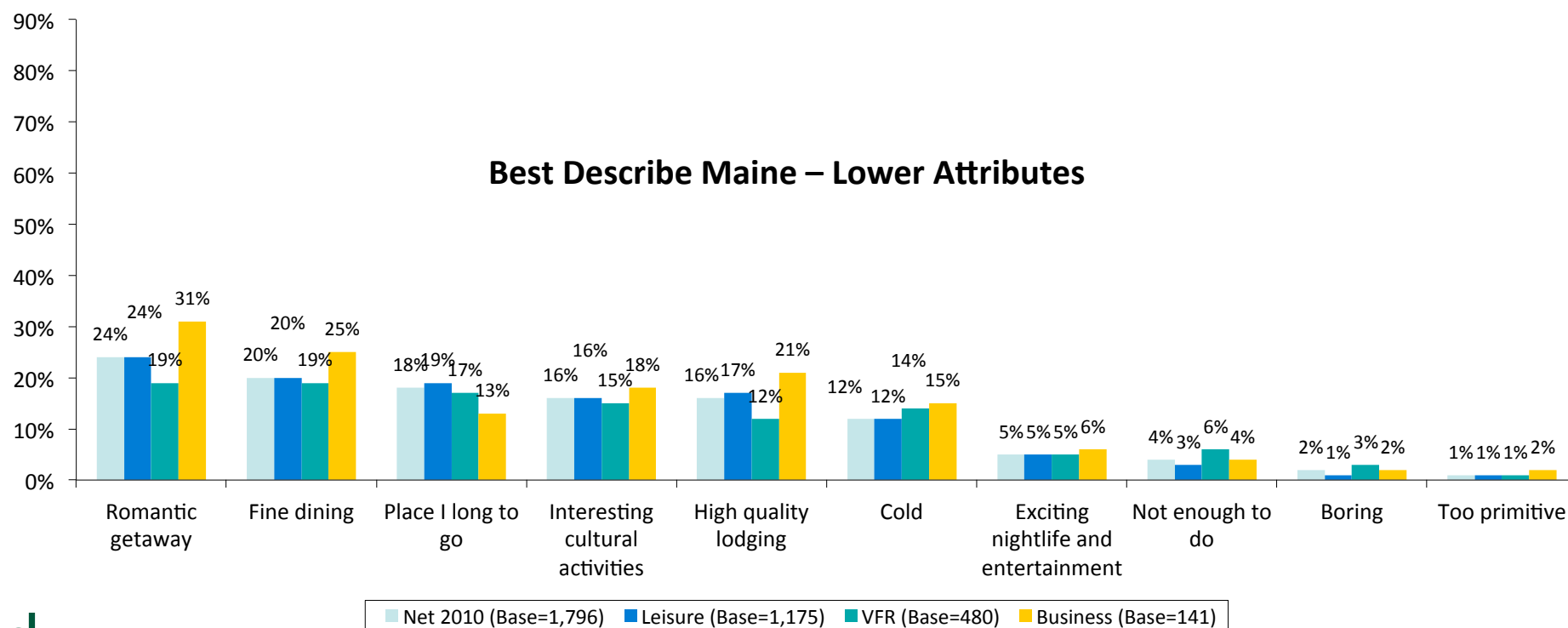
Phrases that Best Describe Maine - Day Visitors

- The only statistically significant year-over-year changes in the top phrases used to describe Maine by day visitors were an increase in the percent of business travelers who reported that Maine is a great place to relax, with clean water and great summer outdoor recreation. This hints at an increased willingness among business travelers to enjoy their surroundings.



Phrases that Best Describe Maine – Day Visitors

- Similar to prior years, the phrases noted below are not greatly attributed by day visitors to Maine. As the data below shows, only a very small percentage of day visitors consider Maine to be too primitive, boring, or believe that there is not enough to do in the state. However, only a quarter associate the state for a romantic getaway and only one-in-five see it for fine dining.



Key Visitor Metrics



Overnight & Day Visitor Spending

- Overall, per trip spending stayed relatively level with that seen in 2009.
- Overnight business travelers spent more per trip in 2010 than in prior years in all categories except recreation, while business day travelers actually spent somewhat less on food as compared to 2009.

2010 Overnight Travel Spending			
	Leisure	VFR	Business
Net Spending	\$788	\$352	\$703 ↑
Spending by Category:			
Lodging*	\$260	\$60	\$300 ↑
Transportation*	\$87	\$75	\$90 ↑
Food*	\$200	\$100	\$150 ↑
Retail Goods**	\$192	\$87	\$134 ↑
Recreation**	\$49	\$30	\$29

2010 Day Travel Spending			
	Leisure	VFR	Business
Net Spending	\$203	\$141	\$100
Spending by Category:			
Lodging*	NA	NA	NA
Transportation*	\$33	\$39	\$32
Food*	\$50	\$50	\$20 ↓
Retail Goods**	\$104	\$42	\$39
Recreation**	\$16	\$10	\$9

*Medians include zero without outliers

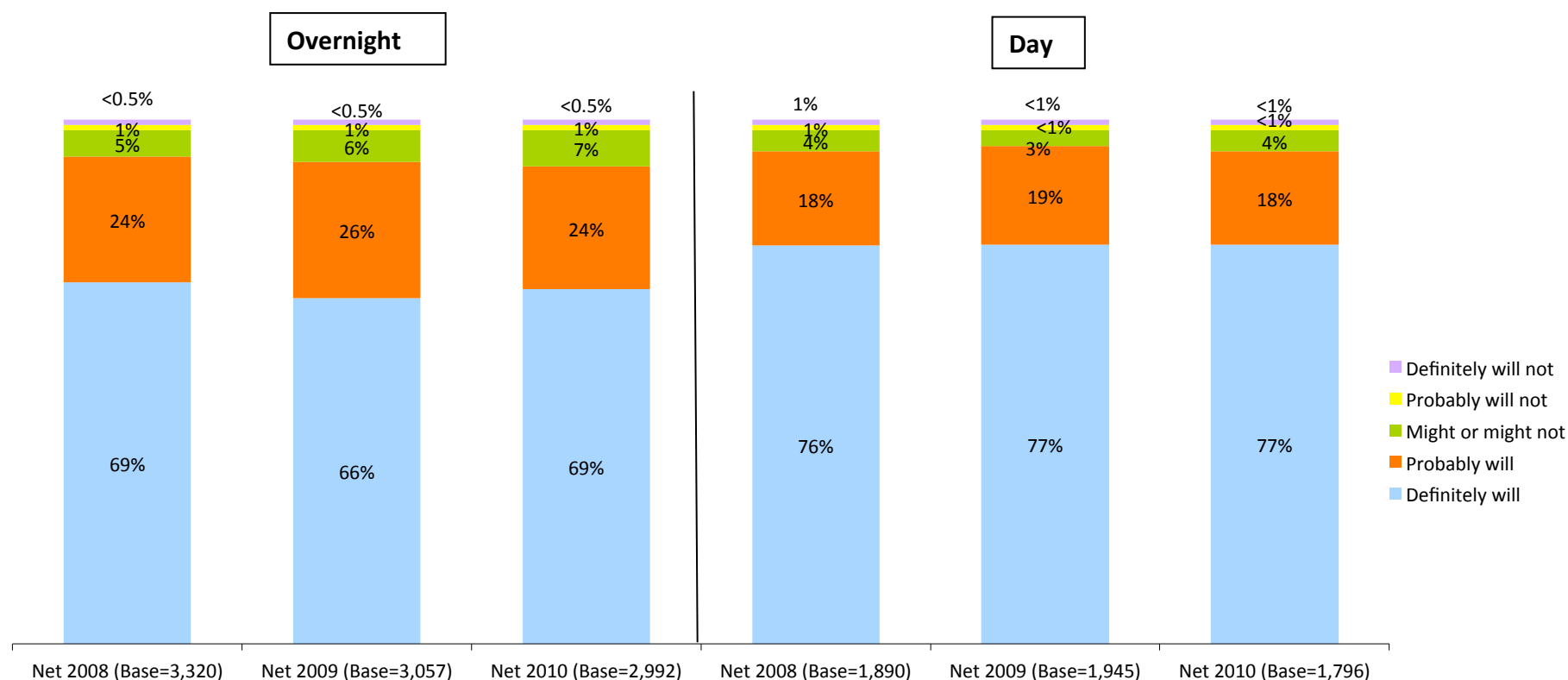
** Means including zero without outliers

Regional Q33 & Day Q14. Please tell us the amount of money you and your immediate travel party spent on this trip in Maine in each of 79 the following categories below.

↑↓ notes significant year-over-year difference at 95% confidence level

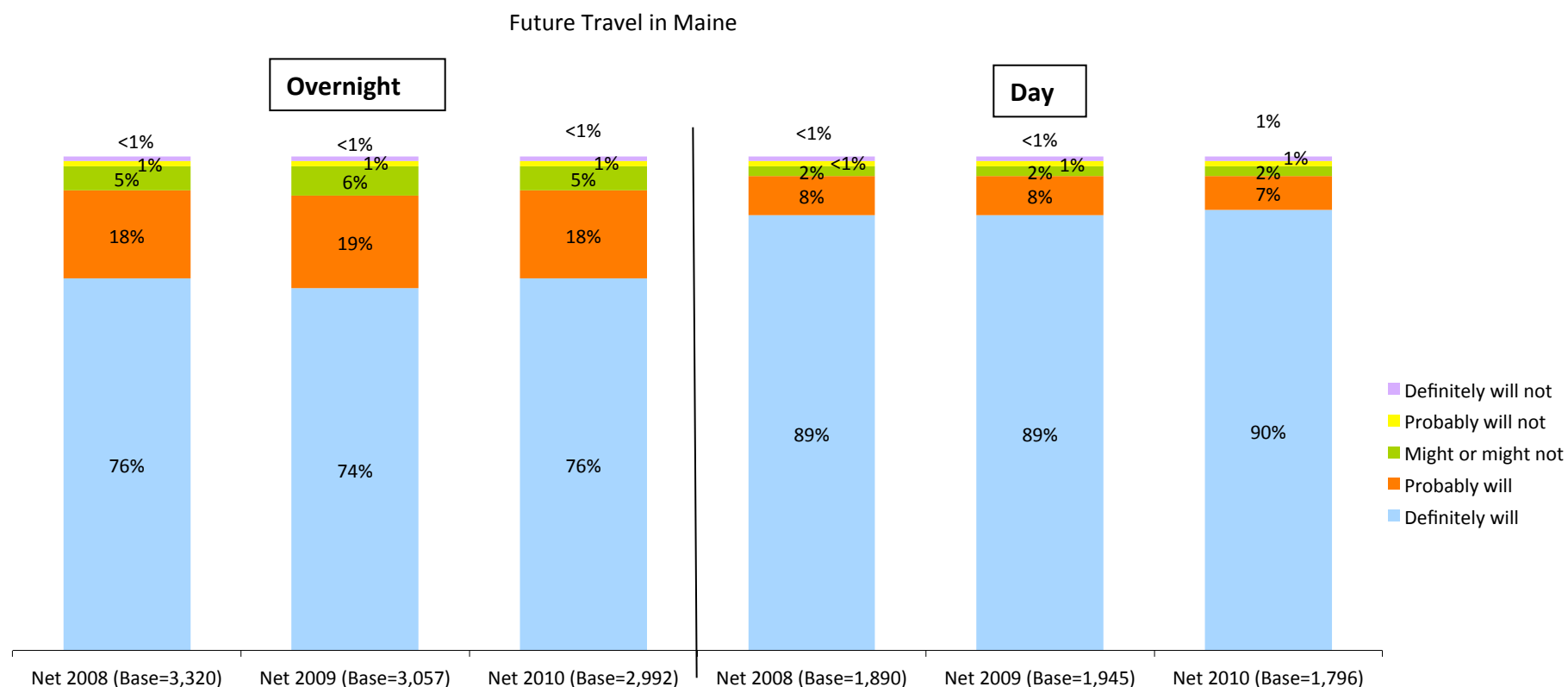
Likelihood to Recommend Maine

- Likelihood to recommend Maine is strong among visitors.
- There were no significant year-over-year changes in the percentage of overnight or day visitors to Maine who reported that they would recommend Maine as a vacation destination to friends or relatives.



Future Travel in Maine

- There was also statistical year-over-year stability in the percentage of overnight and day visitors to Maine who reported that they were likely to come back to Maine again in the future. This bodes well for continued repeat visitation to the state.



1st Time Visitors



Overnight Leisure Visitor Demographics: 2010 Annual Report

1st Time Visitors

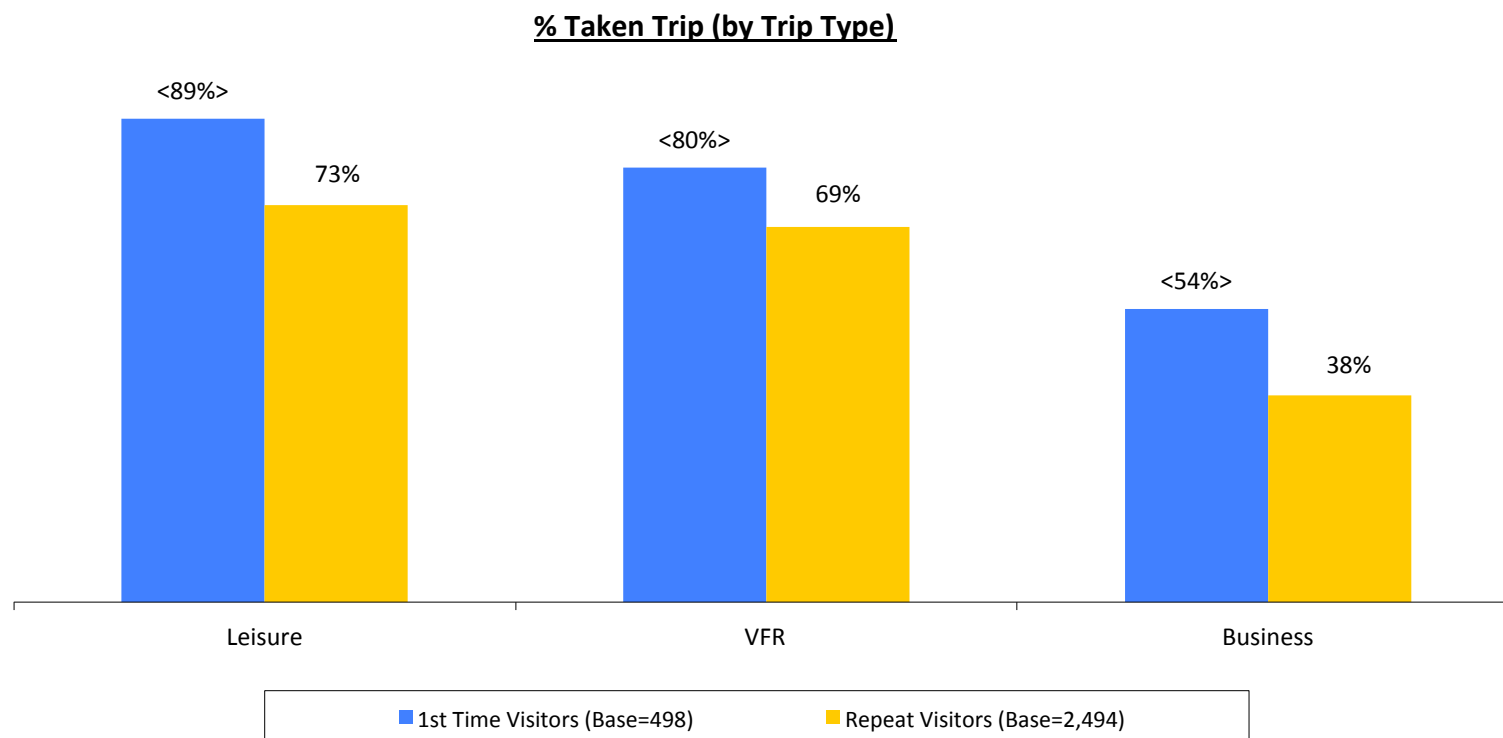
- First time visitors skew younger and importantly take longer visits than those who have visited Maine on a repeat basis. However, both first time and repeat visitors are similar on other demographic criteria such as income or marital status.

2010		
	1 st Time (Base=498)	Repeat (Base=2,494)
Mean Age	37.6	<45.5>
< 35	<46%>	29%
35 - 44	<25%>	18%
45 - 54	15%	<22%>
55 +	14%	<31%>
Mean Income	\$99,140	\$105,690
< \$50,000	17%	13%
\$50,000 - \$99,000	38%	35%
\$100,000 +	32%	37%
Female	48%	46%
College Degree or Higher	76%	78%
Married	51%	56%
Employed Full Time	63%	65%
Length of Stay	<4.3>	3.5

<> notes significant difference at 95% confidence level

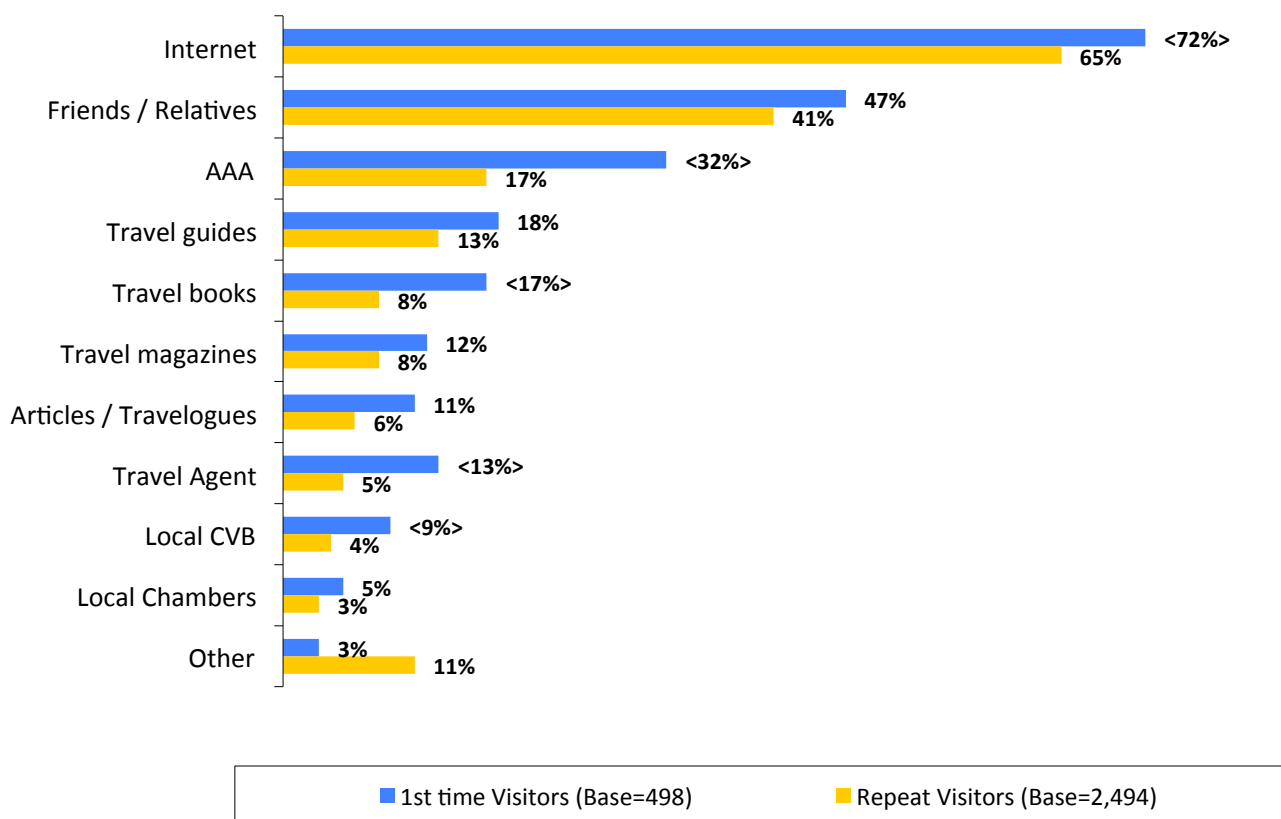
Travel Patterns Among Maine Overnight Visitors

- In addition to traveling to Maine, 1st time visitors to Maine are more likely to have recently traveled across all trip types (leisure, VFR, business), suggesting they are knowledgeable travelers.



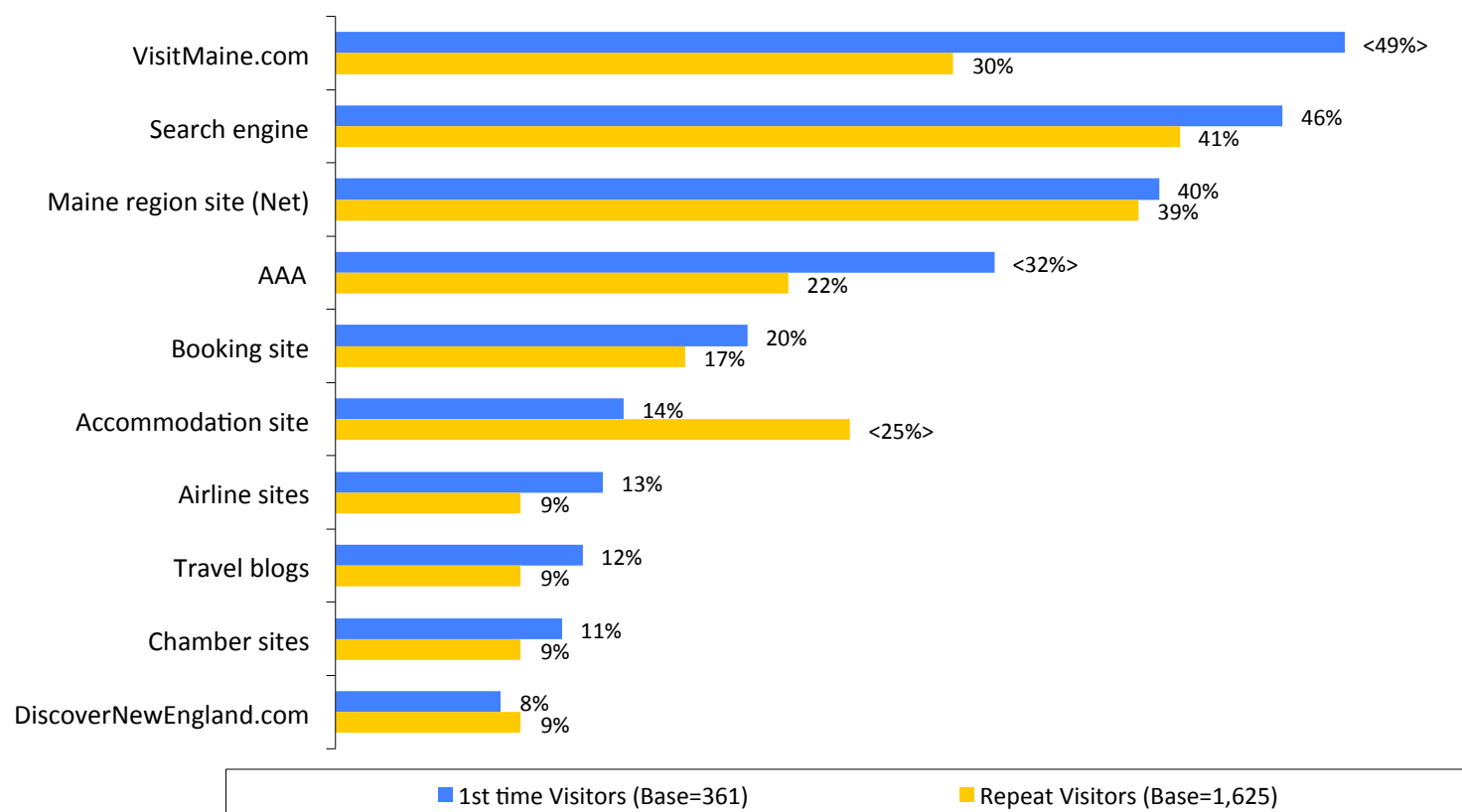
Trip Planning Sources – 1st Time Visitors

- First time visitors are much more active in using sources to help plan their overnight trips to Maine, spending time on the Internet, contacting AAA, reading travel books, talking with travel agents and contacting local CVBs.



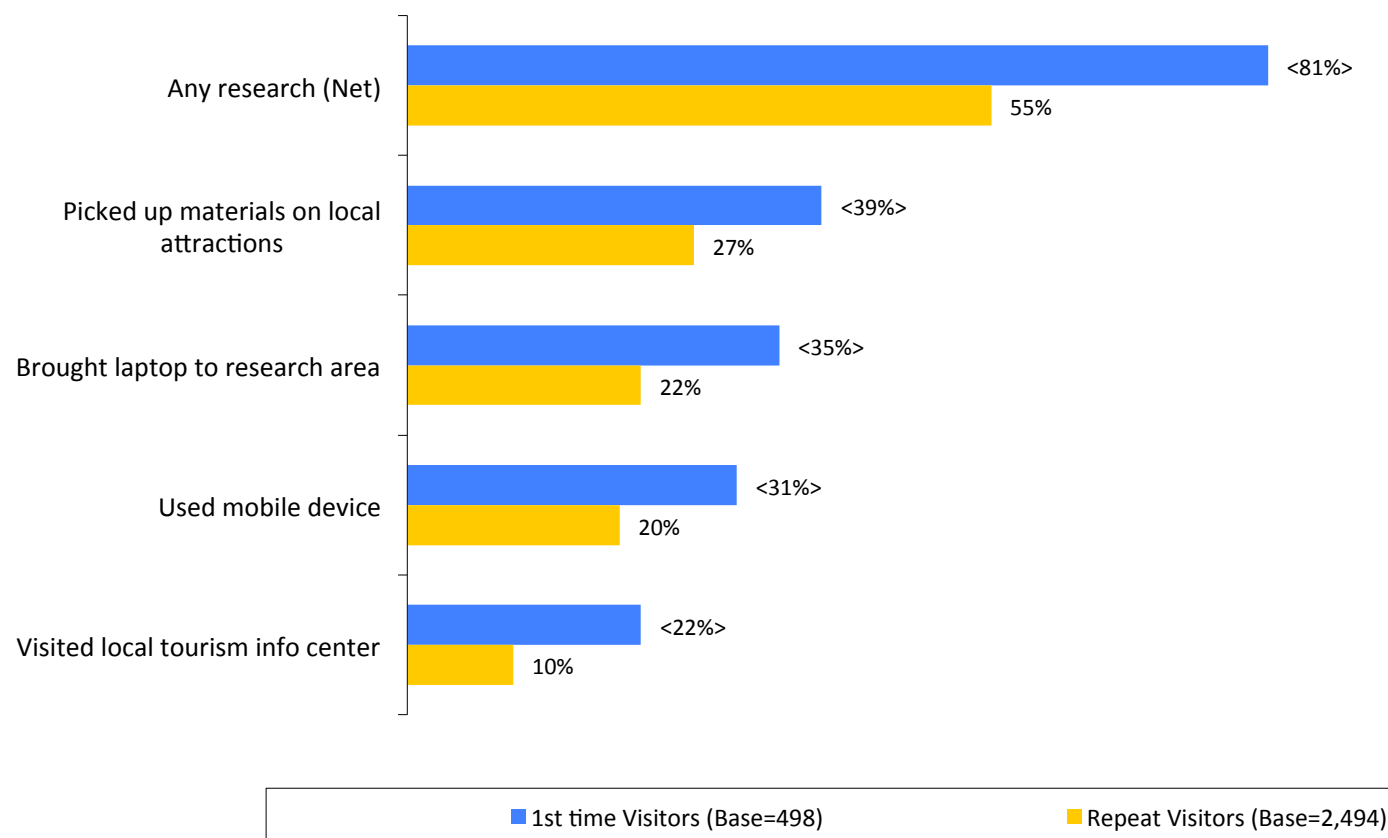
Online Trip Planning Sources – 1st Time Visitors

- Importantly, 1st time visitors are more likely than repeat visitors to have visited the state tourism website (VisitMaine.com) while planning their first trip to Maine. AAA is another source more likely to be used by first time visitors, while repeat visitors are more likely to head straight to the website of an accommodation.



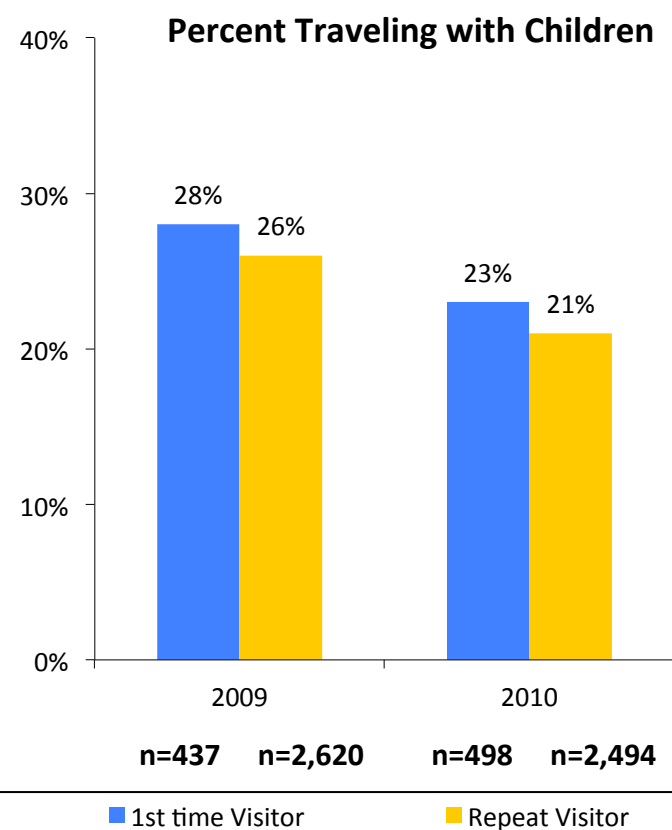
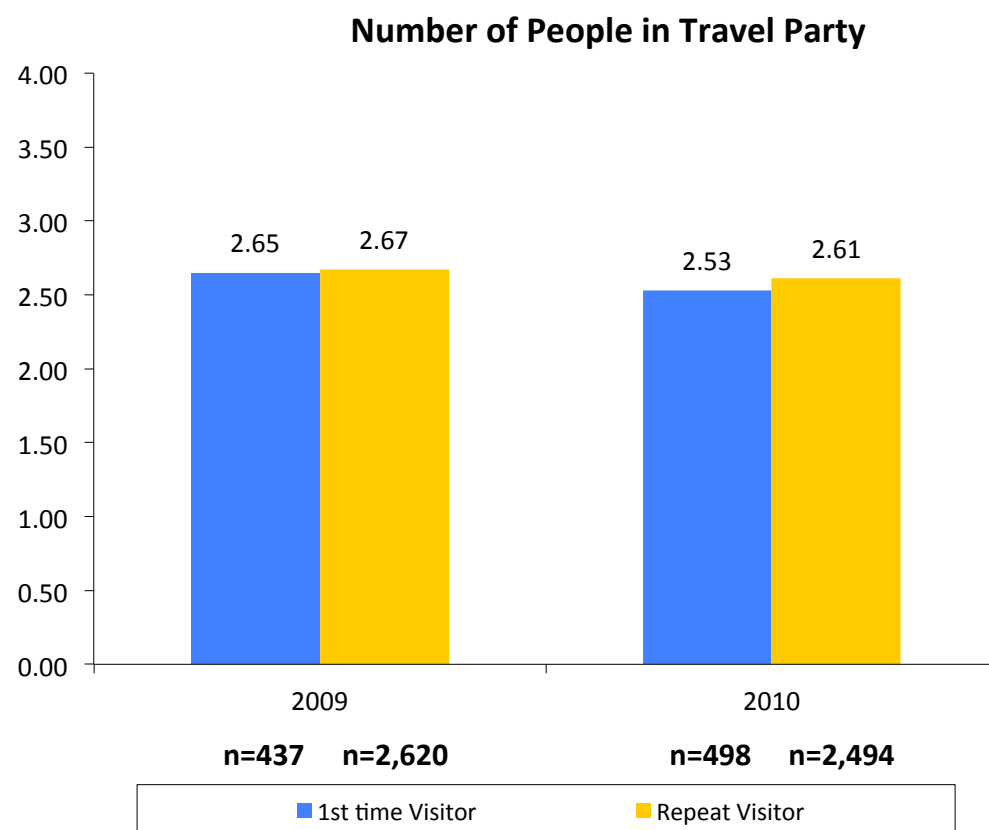
Trip Research While in Maine – 1st Time Visitors

- Perhaps due to having less familiarity with the state of Maine, 1st time visitors are more likely to continue to research places to go and things to do in the midst of their visit. This includes utilizing a variety of techniques to conduct research, from picking up hard copy materials and visiting tourism information centers to using their laptops and mobile devices to gather information electronically.



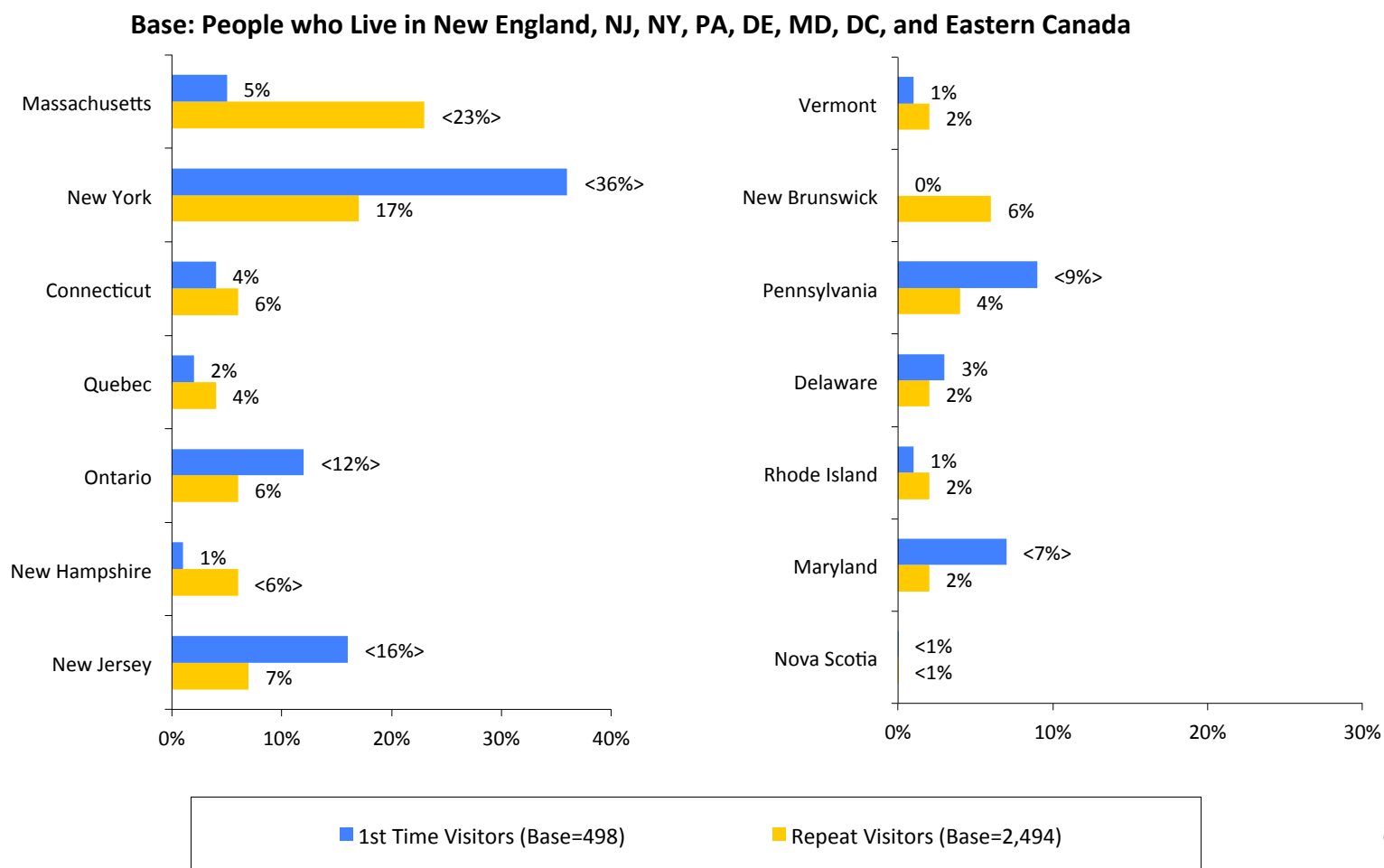
Travel Party Size and Composition

- Travel party composition is similar between 1st time and repeat visitors.



Overnight Leisure Visitor Residence: 1st Time Visitors

- Not surprisingly, first time visitors to Maine are more likely to come from the mid-Atlantic states as opposed to closer in New England states. Importantly, many 1st time visitors come from Canada, and in particular, the Ontario province.



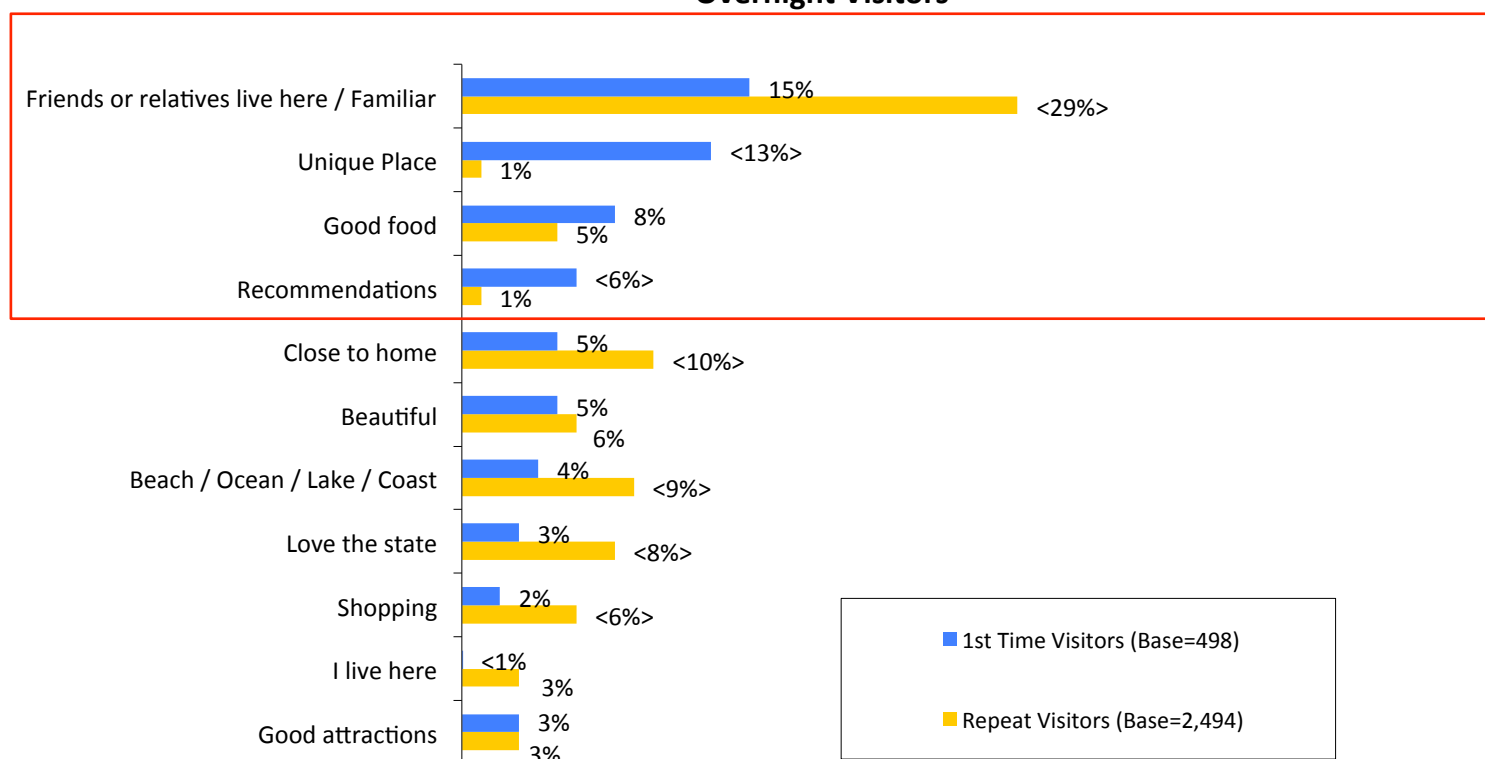
State/Province of residence.

< > notes significant year-over-year difference at 95% confidence level

Reasons for Selecting Maine - 1st Time Visitors

- While repeat visitors are likely to visit Maine due to their familiarity with the state or to visit friends or relatives, this is also a draw for many 1st time visitors as well. However, 1st time visitors are also likely to visit because they feel that Maine has something unique, has good food to offer, or because they are responding to the recommendations of others.

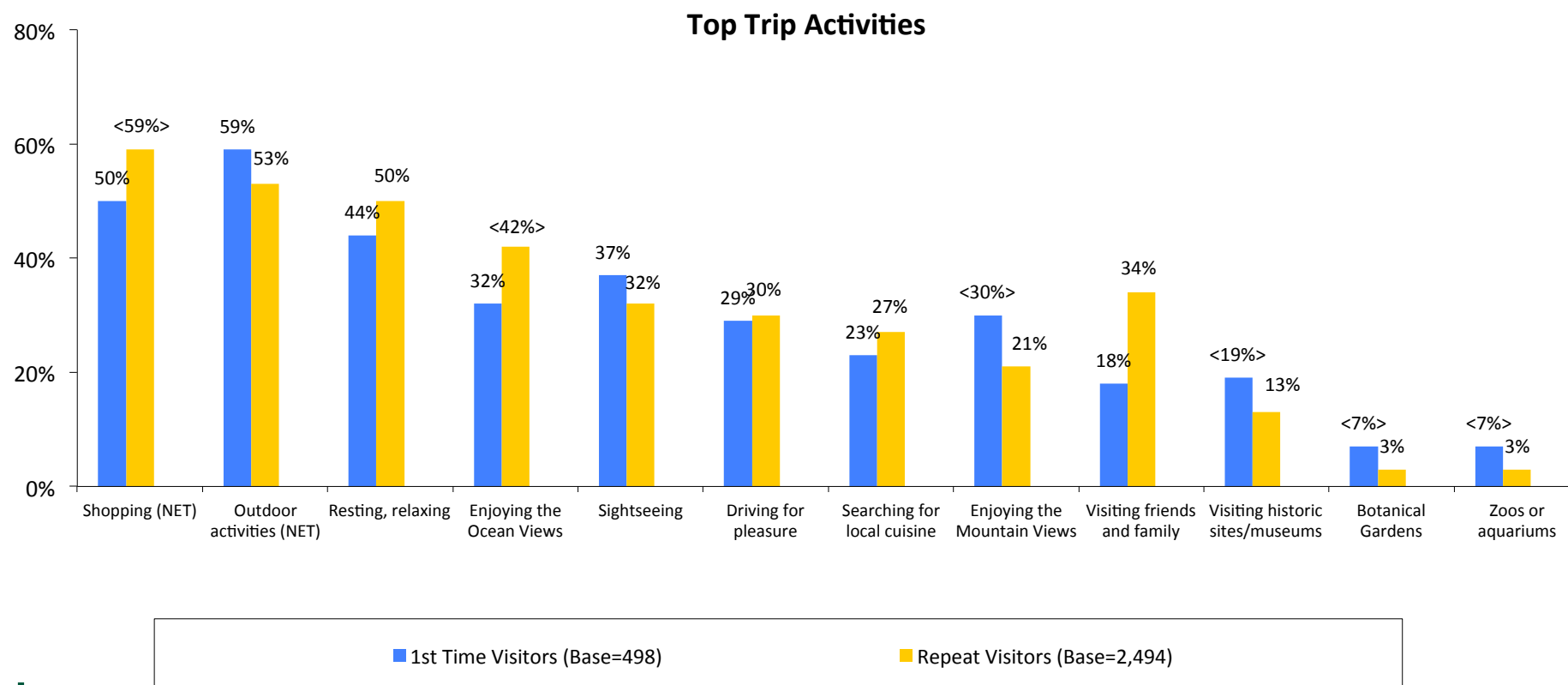
**Reasons for Selecting Maine
Overnight Visitors**



Overnight Leisure Trip Activities:

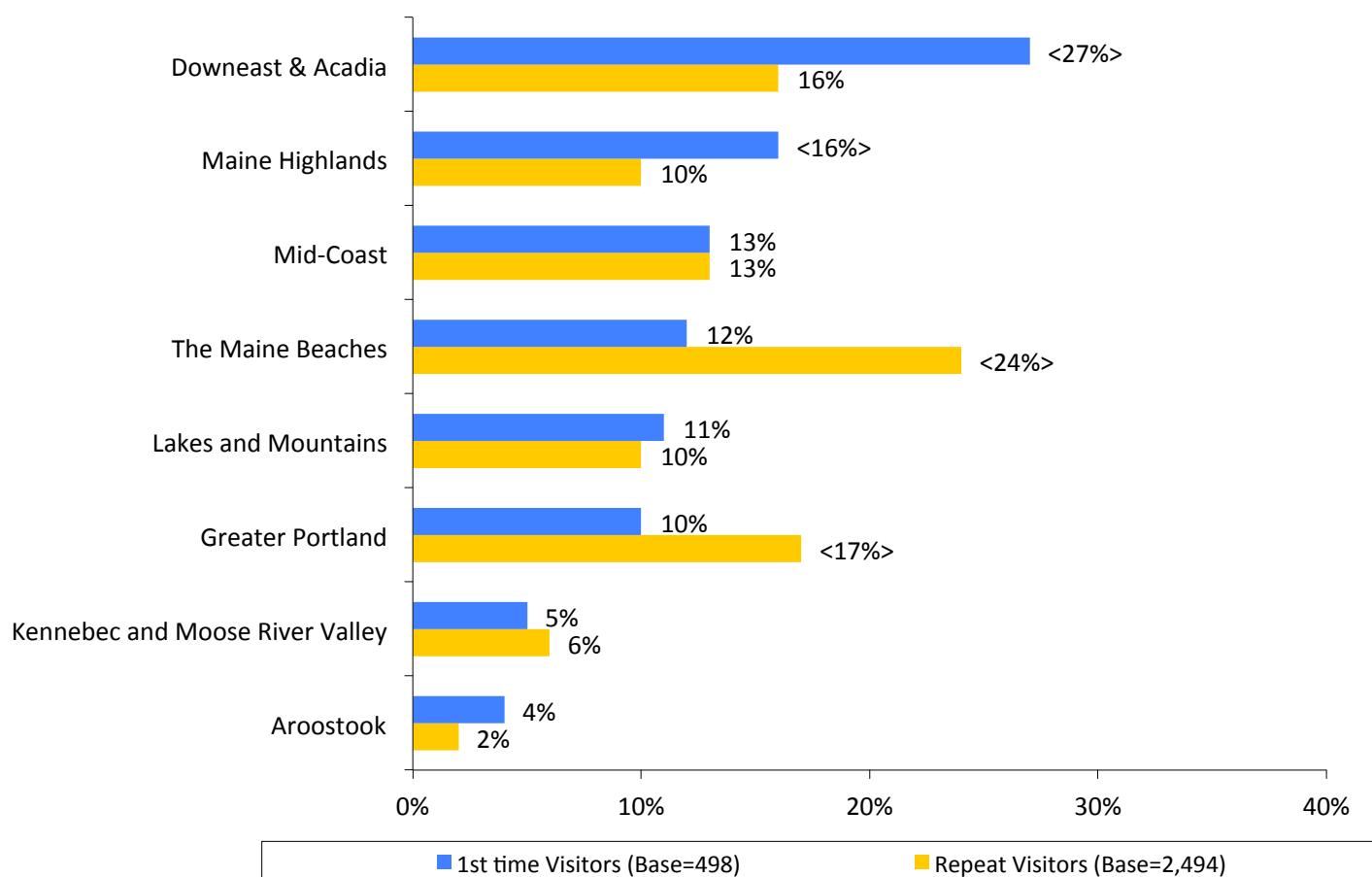
1st Time Visitors

- Less likely to spend time in Maine shopping or visiting friends and family, 1st time visitors travel to Maine to relax, enjoy the mountain views, and visit cultural sites such as museums, historical sites, gardens, zoos or aquariums.
- Repeat visitors are more likely to visit Maine beaches.



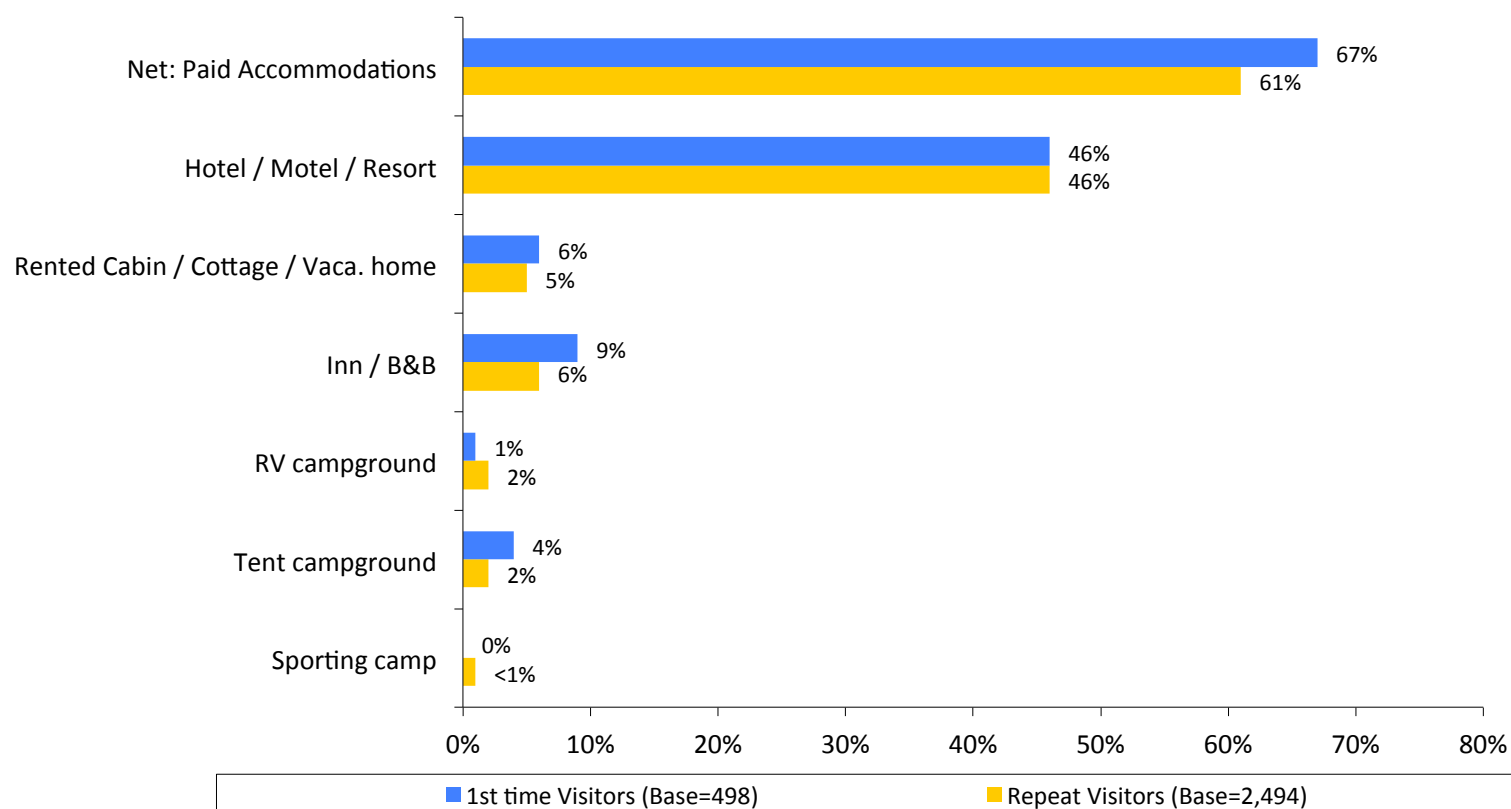
Primary Region of Visit to Maine - 1st Time Visitors

- While 1st time visitors are traveling to a number of regions within Maine, they are more likely than repeat visitors to visit the Downeast & Acadia region as well as the Maine Highlands. First time visitors are somewhat less likely to be visiting the Maine Beaches or the Greater Portland area as their primary region.



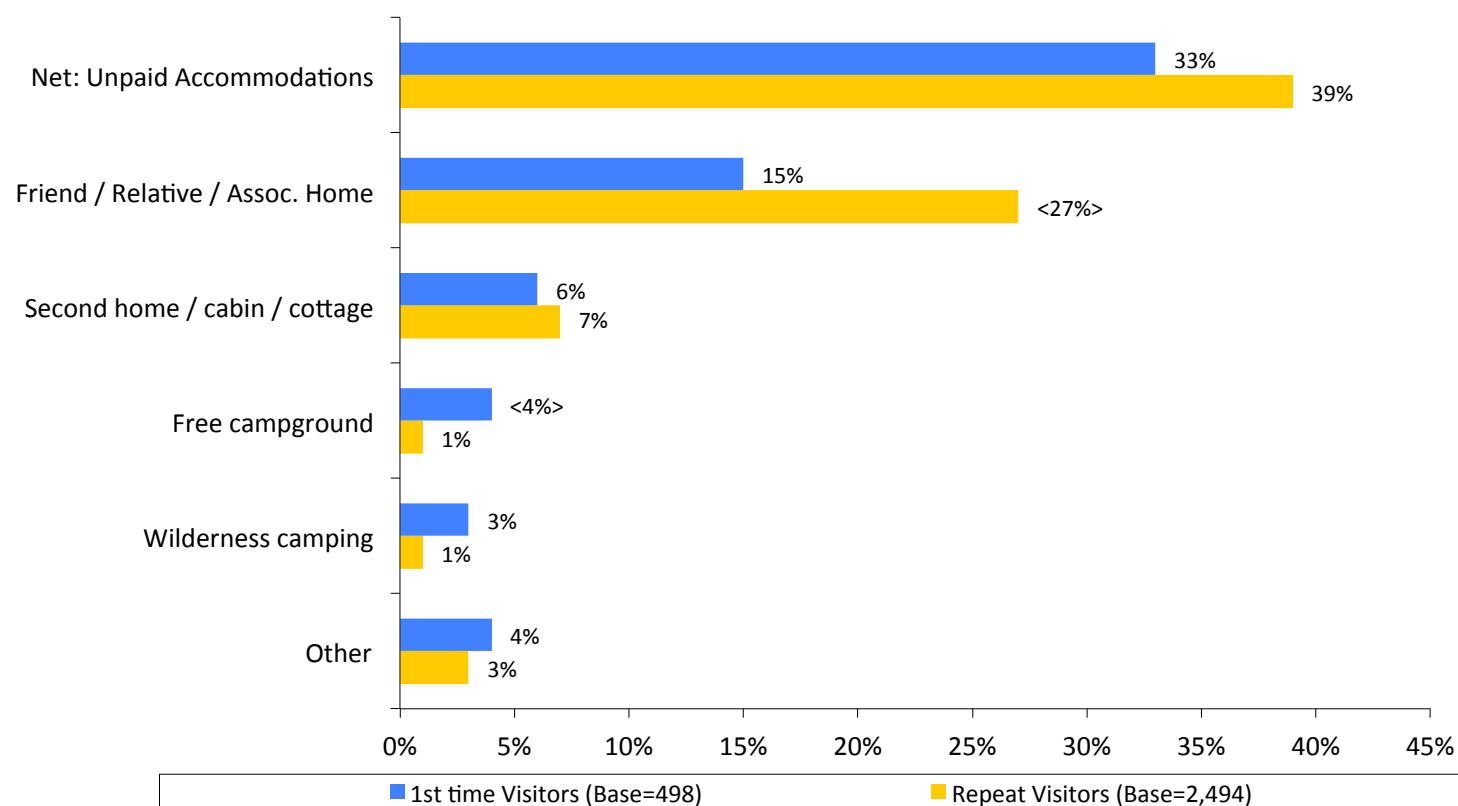
Paid Accommodations While in Maine

- First time and repeat visitors have similar patterns in the types of paid accommodations they stay in.



Unpaid Accommodations While in Maine

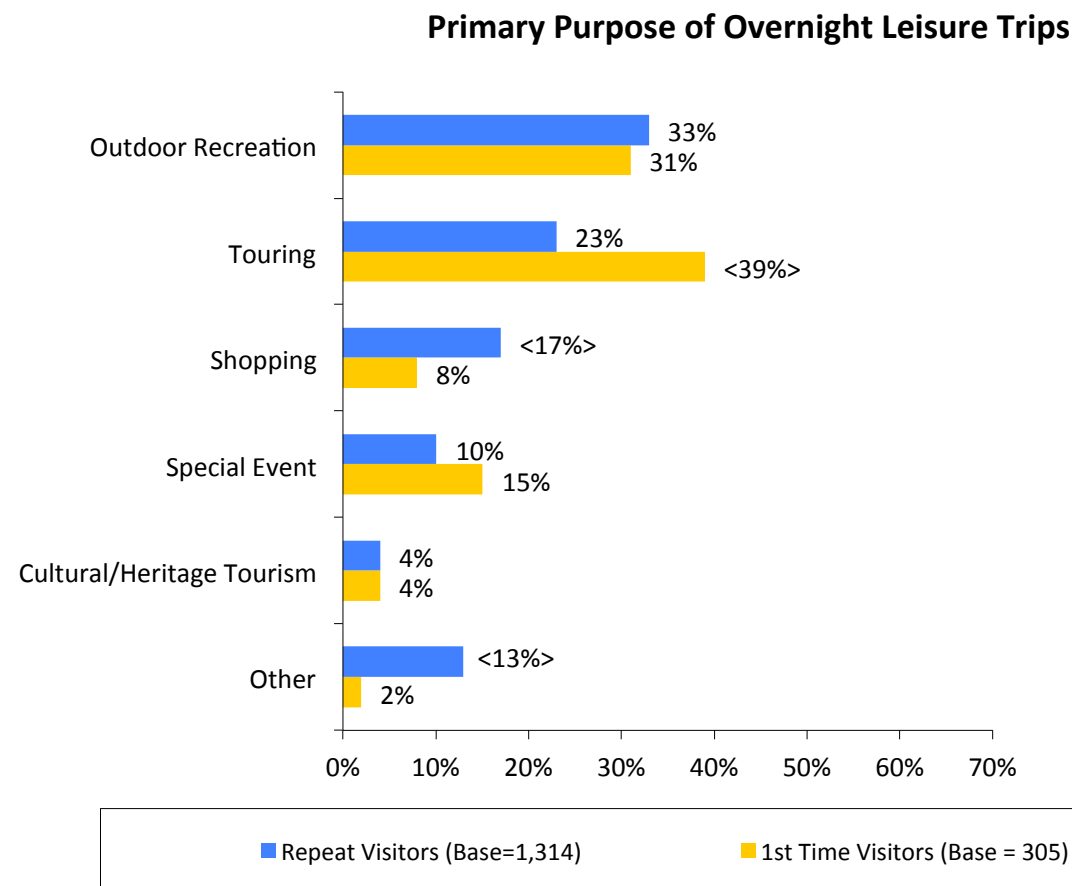
- First time visitors to Maine are less likely than repeat visitors to be able to stay in the home of a friend, relative or associate. They are somewhat more likely to stay in a free campground.



Primary Purpose of Overnight Leisure Trips:

1st Time Visitors

- Those visiting Maine for the first time are often coming on touring trips designed to experience the unique sights and scenes Maine has to offer. Those coming to Maine for the first time are less likely to say they are coming to take advantage of Maine's shopping opportunities than those making a return visit.



Day Leisure Visitor Demographics:

1st Time Visitors

2010 Annual Report

- As with overnight visitors, 1st time day visitors tend to be younger than those who have visited Maine in the past. Otherwise, demographics are similar between 1st time and repeat visitors to Maine.

2010		
	1 st Time (Base=67)*	Repeat (Base=1,728)
Mean Age	36.3	<46.7>
< 35	<61%>	27%
35 - 44	9%	17%
45 - 54	14%	21%
55 +	16%	<35%>
Mean Income	\$81,230	\$91,600
< \$50,000	29%	23%
\$50,000 - \$99,000	49%	42%
\$100,000 +	22%	35%
Female	51%	51%
College Degree or Higher	73%	74%
Married	45%	61%
Employed Full Time	67%	61%

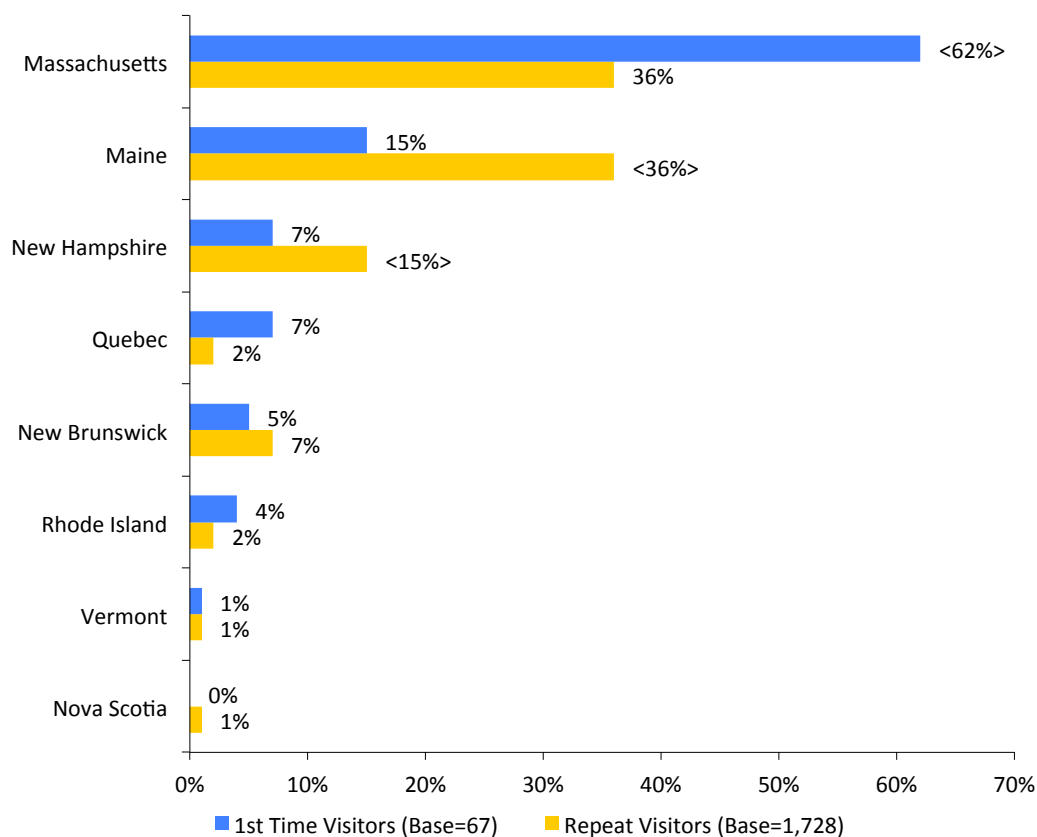
< > notes significant difference at 95% confidence level

*Note: Small sample size

Day Leisure Visitor Residence:

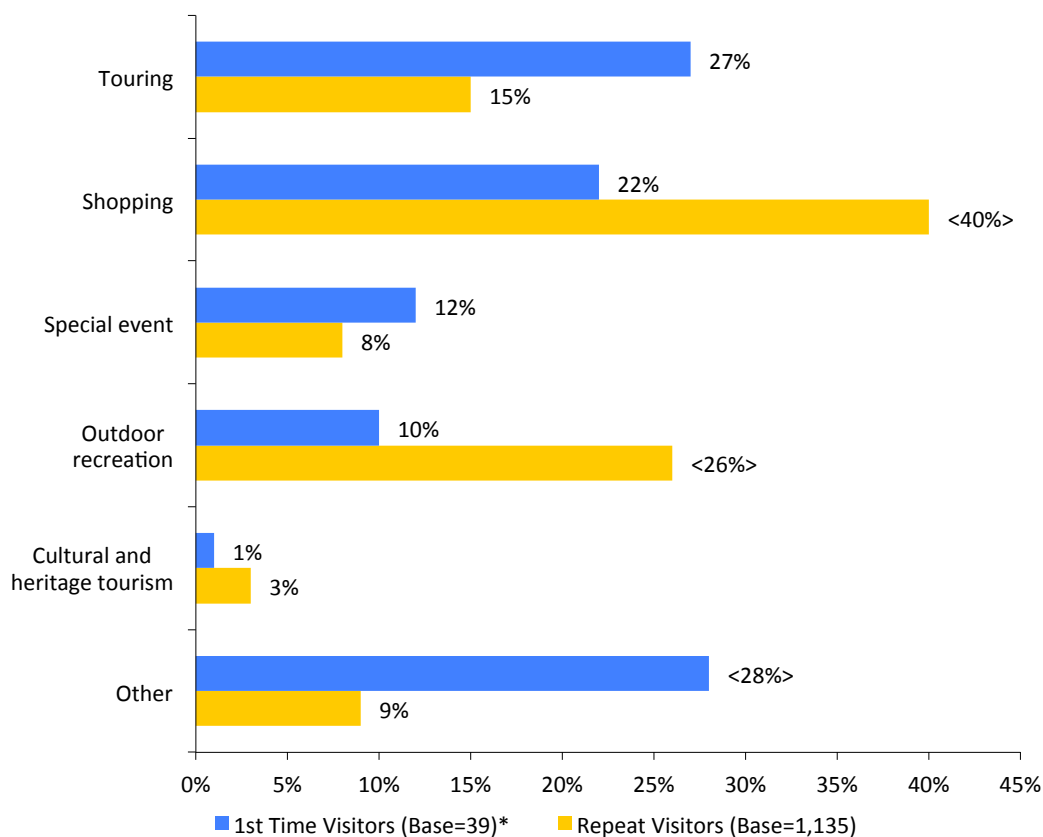
1st Time Visitors

- 1st time day trip visitors to Maine are more likely to come from Massachusetts than are repeat visitors. They are less likely to be from Maine or New Hampshire.



Primary Purpose of Day Leisure Trips: 1st Time Visitors

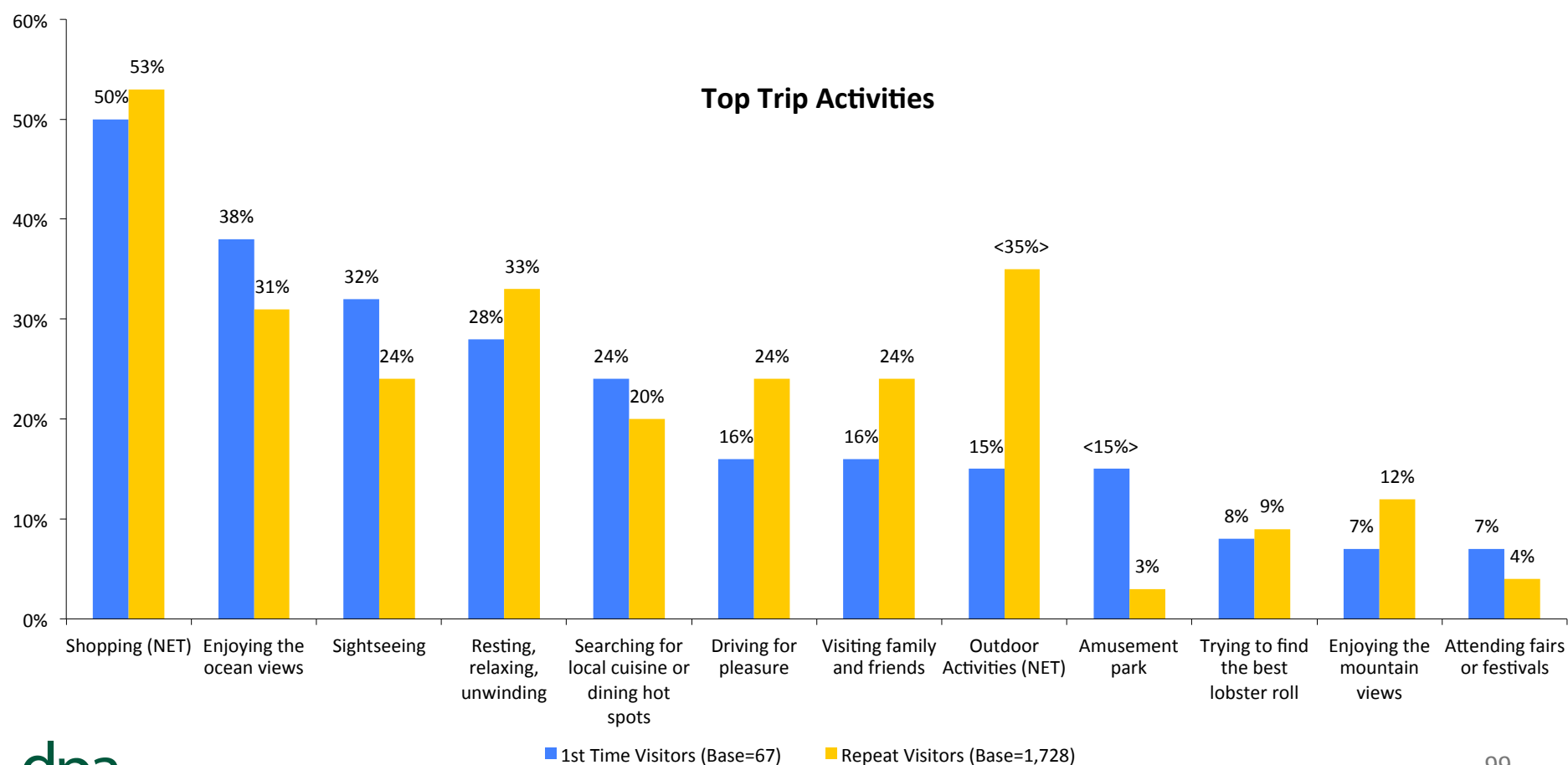
- While shopping is often the primary purpose of repeat day trips to Maine, 1st time visitors are more likely to spend their time touring.



Day Leisure Trip Activities:

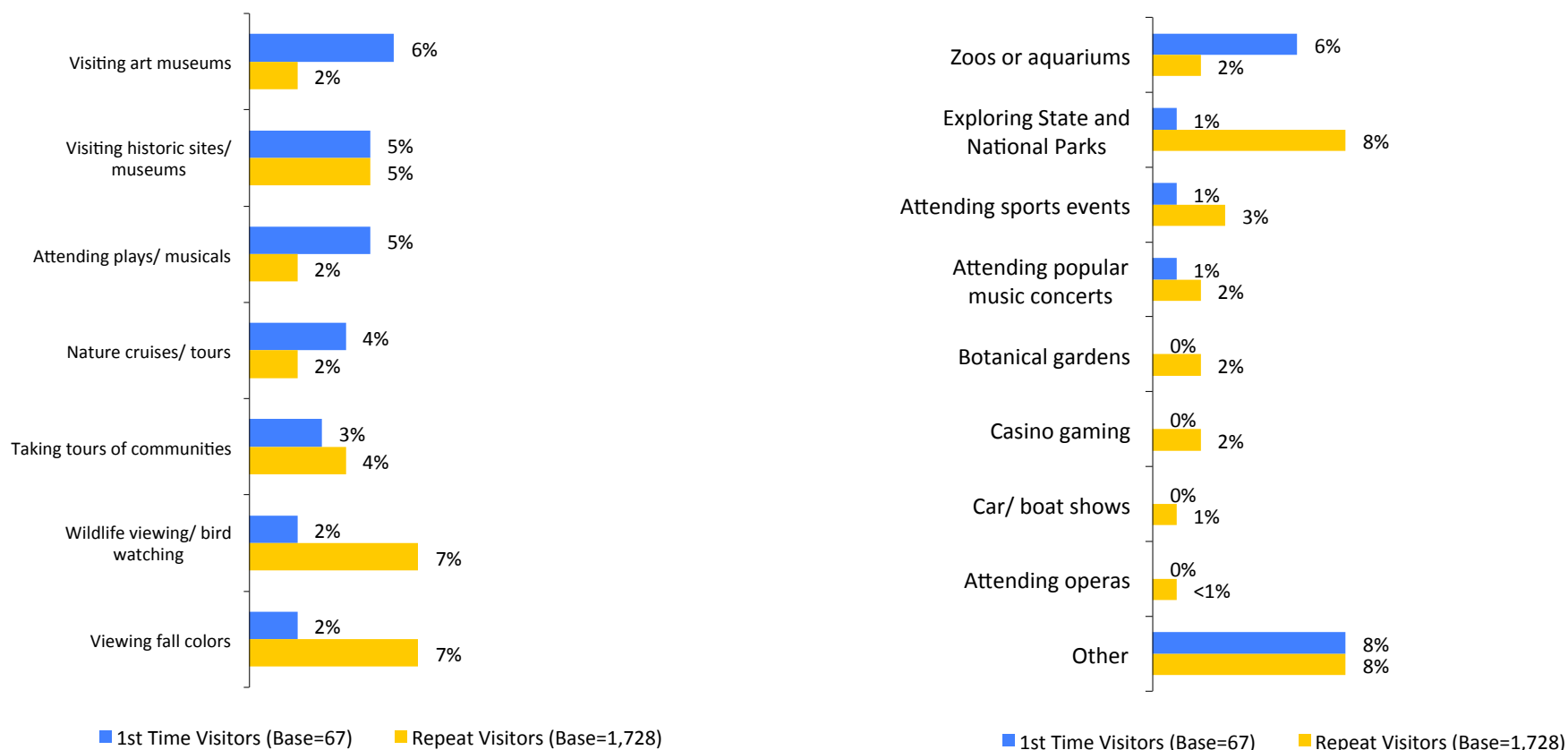
1st Time Day Visitors

- 1st time day trip visitors are likely to spend their day shopping, enjoying the ocean views, and sightseeing. They are also more likely than repeat visitors to go to an amusement park.



Day Leisure Trip Activities: 1st Time Day Visitors

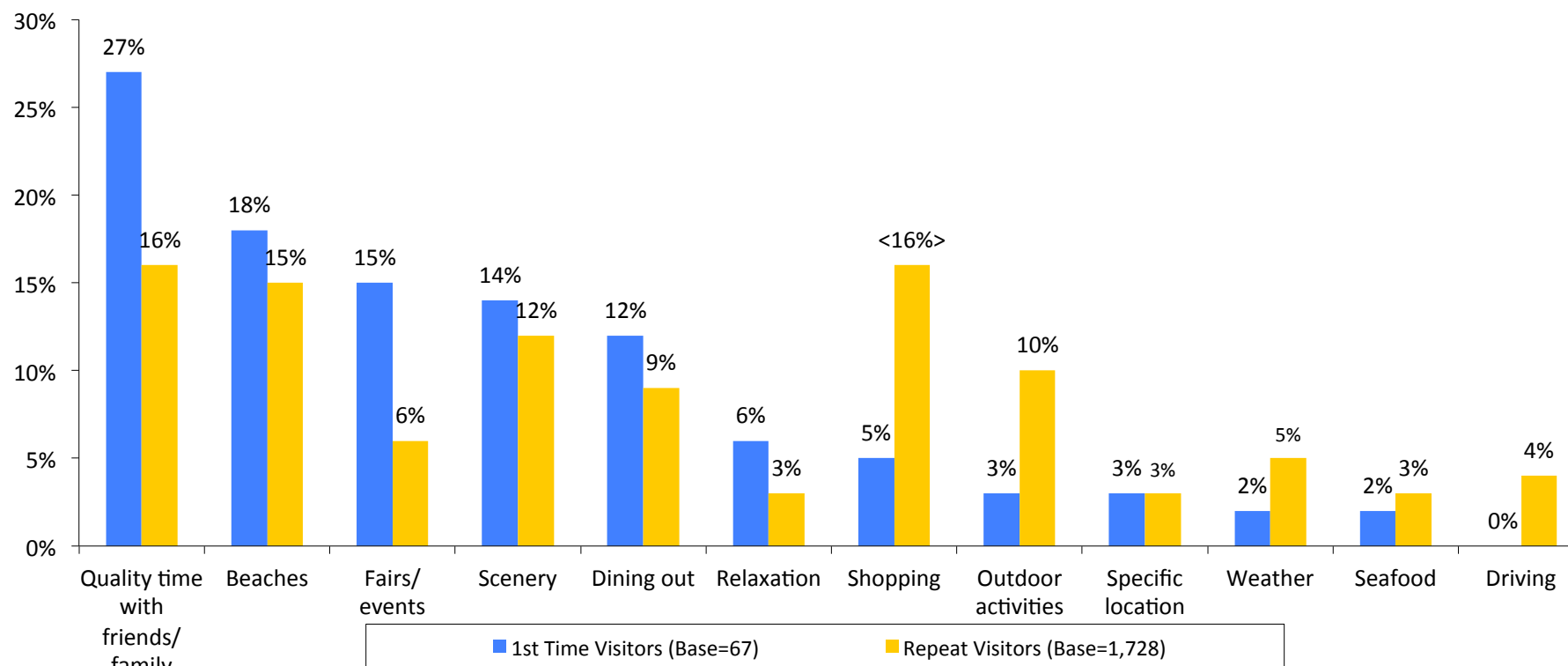
Lower Utilized Trip Activities



Highlight of Trip to Maine – 1st time Day Visitors

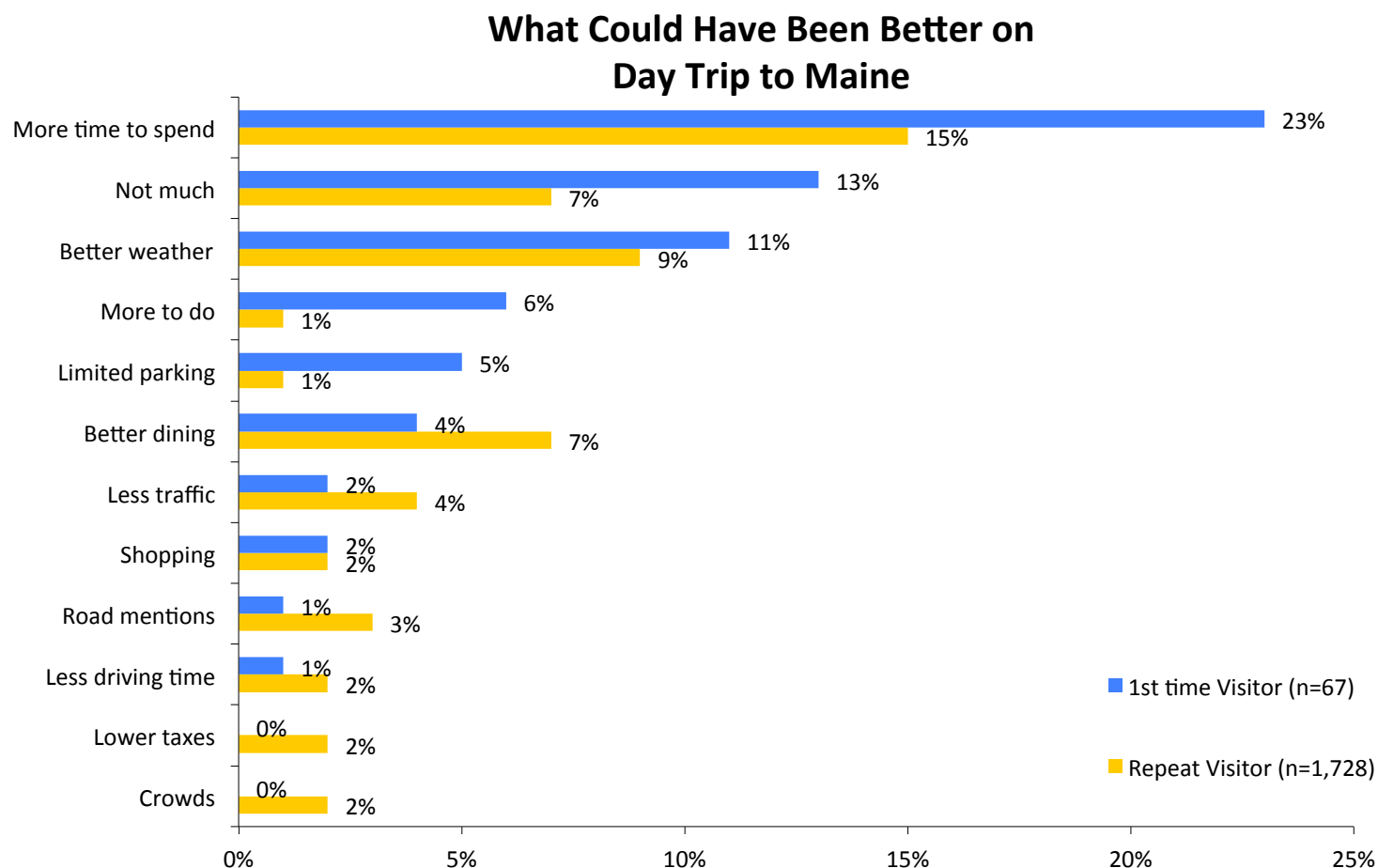
- 1st time day visitors to Maine pointed to quality time with friends, beaches, and fairs/ events as the highlight of their day trip to Maine.

Highlight of Day Trip to Maine



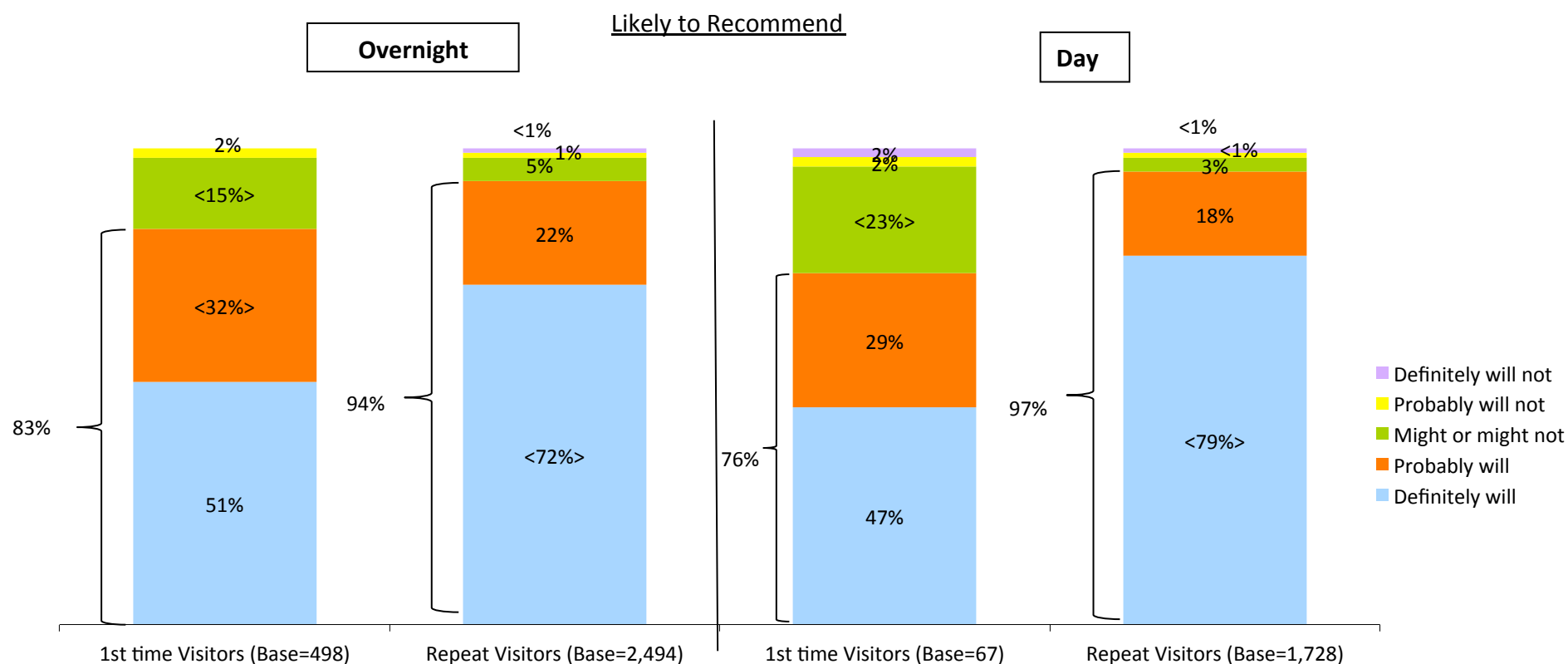
What Could Have Been Better on Trip to Maine – *First time Day Visitors*

- Even more so than repeat visitors, first time visitors to Maine wish they could have more time to spend on their trip.



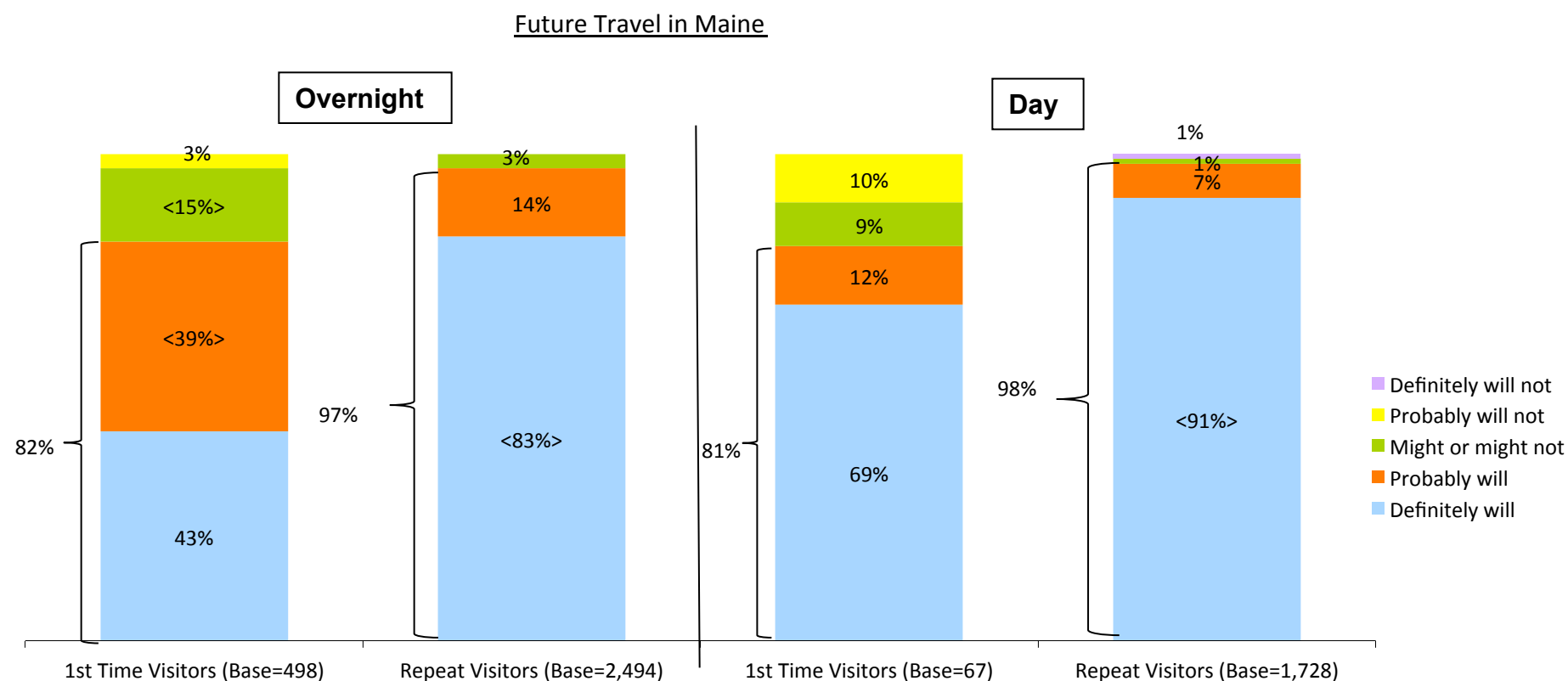
Likelihood to Recommend Maine 1st Time Visitors

- While not as strong as repeat visitors, who are fully converted to the positives of the Maine experience, 8 in 10 1st time visitors report some likelihood to recommend Maine as a vacation destination to their friends or relatives. However, fewer 1st time visitors are 'definite' about their willingness to recommend a trip to the state.



Future Travel in Maine 1st Time Visitors

- Not surprisingly, likelihood to travel to Maine in the future is not as strong among 1st time visitors as it is for repeat visitors, who have already established a pattern of visitation to Maine. Still, eight out of ten first time visitors are probably or definitely likely to visit Maine in the future, a very positive indicator for Maine tourism.



Attracting 1st Time Visitation

- In order to gauge the effectiveness of attracting first time visitors to Maine by region, we compared the ratio of first time visitors by target area (New England, Mid-Atlantic, Canada) to the ratio of total population among those regions.
- What becomes clear is that while the majority of first time visitors to the area hail from the Mid-Atlantic states (New York, New Jersey, Pennsylvania, Delaware, Maryland, Washington, DC), Maine is not securing as many new visitors as it could from the Eastern Canadian Provinces.

	% of Target Population	% of 1 st Time Visitors	Difference
New England (excluding Maine)	4.7%	11.3%	6.6%
U.S. Mid-Atlantic	65.3%	74.8%	9.5%
Eastern Canada	30.0%	13.5%	-16.5%


Canadian Visitors



Overnight Leisure Visitor Demographics: 2010 Annual Report

Canadian Visitors

- Canadian visitors to Maine tend to be older than the average U.S. visitor, averaging about 47 years old. In addition, Canadian overnight visitors tend to have a higher household income than those visiting from the U.S. Many have been coming to Maine for a long time, almost half made their first trip prior to 1980 suggesting a need to attract younger Canadian visitors.

	2009 (Base=515)	2010 (Base=502)
Mean Age	47.2	47.3
< 35	13%	16%
35 - 44	24%	19%
45 - 54	35%	39%
55 +	29%	26%
Mean Income	\$110,200	\$116,210
< \$50,000	8%	7%
\$50,000 - \$99,000	28%	31%
\$100,000 +	42%	44% 
Female	33%	41%
College Degree or Higher	85%	81%
Married	71%	61%
Employed Full Time	69%	69%

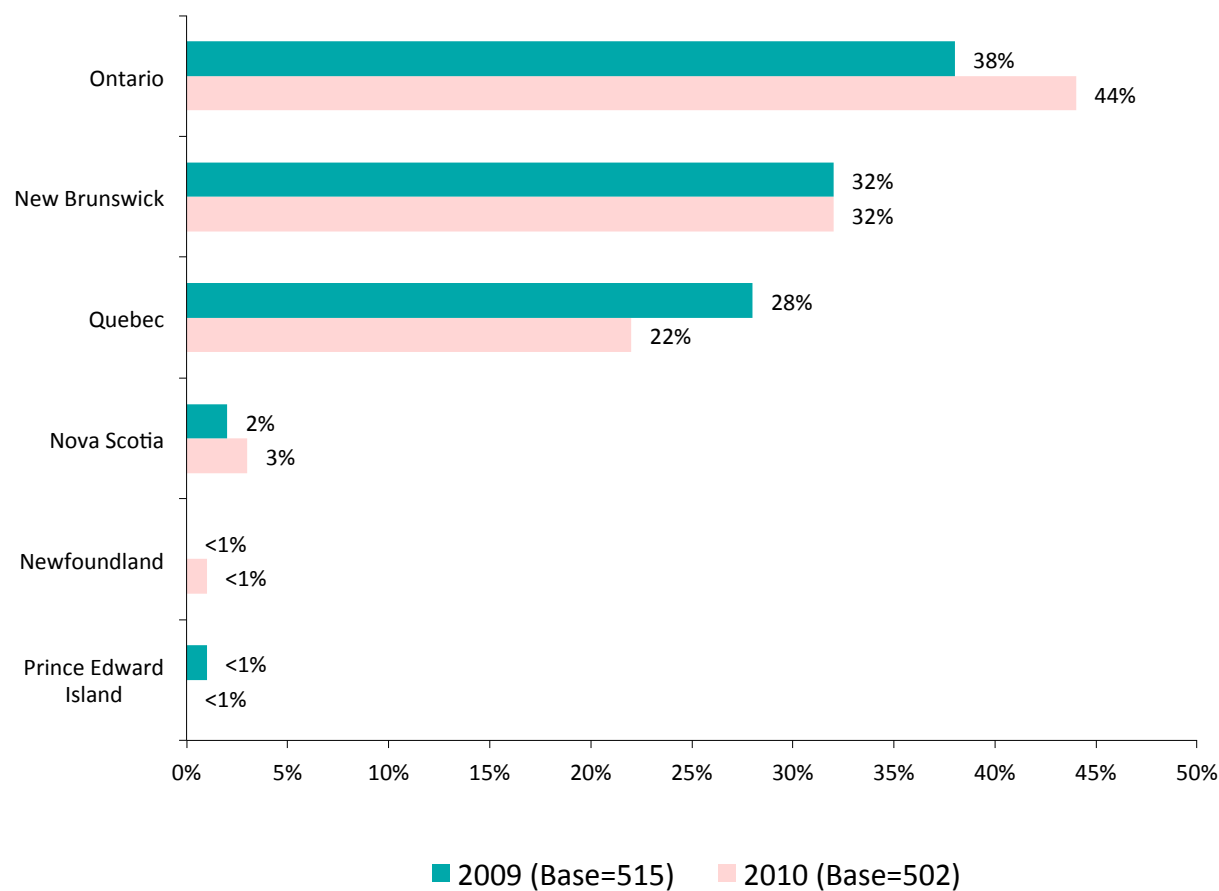
First Visit to Maine

Compared to visitors from New England or the Mid-Atlantic, Canadian visitors are most likely to have made their first visit to Maine prior to 1980.

Canada (a)	45% bc
Mid-Atlantic (b)	22%
New England (c)	36% b

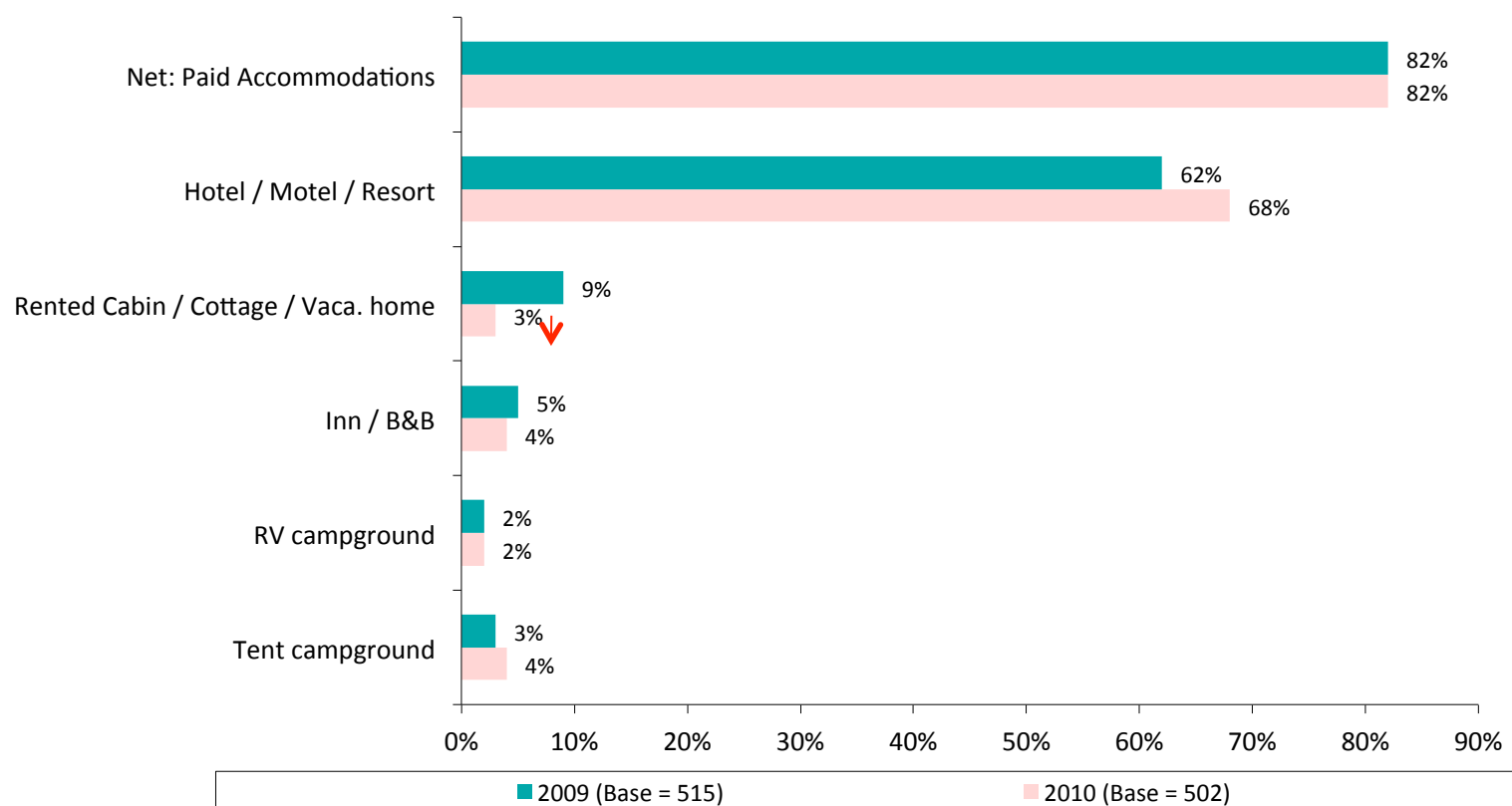
Overnight Visitor Residence: Canadian Visitors

- Canadian overnight visitors to Maine are most likely to come from the Ontario, New Brunswick, or Quebec provinces.



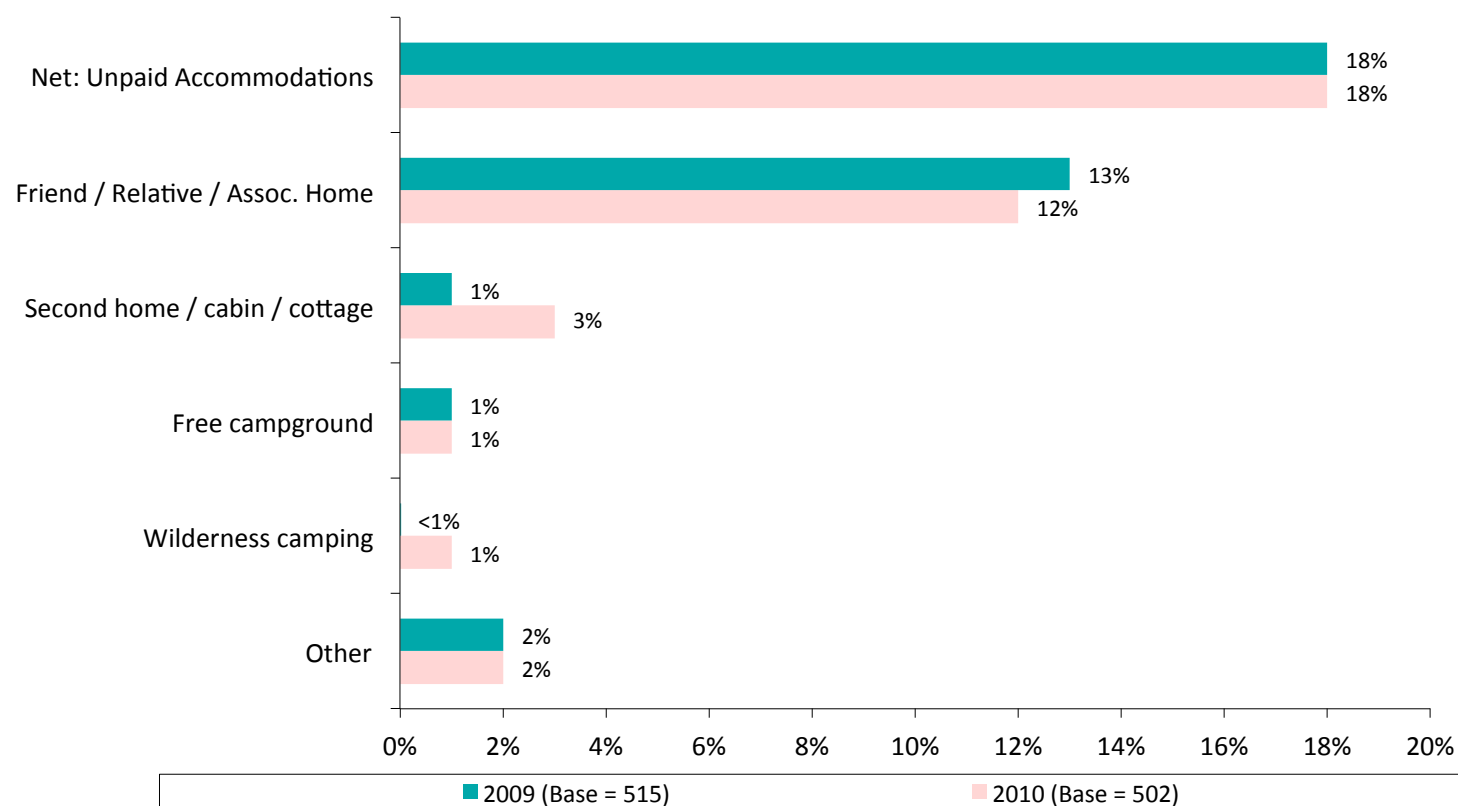
Paid Accommodations While in Maine – Canadian Visitors

- Canadian visitors are much more likely than U.S. visitors to stay in paid accommodations, with 8 out of 10 utilizing some form of paid lodging. In particular, Canadian overnight visitors are staying in hotel/motel/resort properties. Versus year ago, however, fewer are using rented cabins, cottages, or vacation homes.



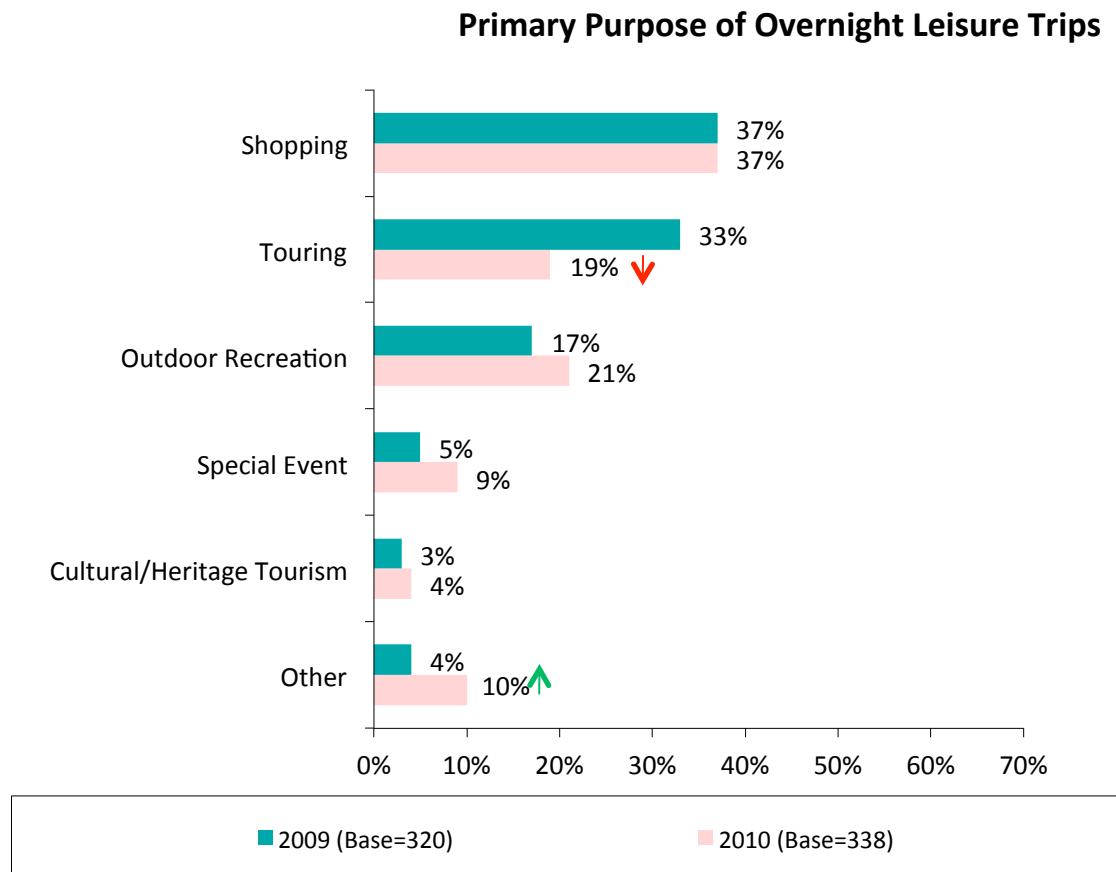
Unpaid Accommodations While in Maine

- Canadian visitors are less likely to stay in unpaid accommodations than U.S. overnight visitors to Maine. In particular, a smaller percentage of Canadians are staying in the home/cabin/cottage/condo of someone they know.



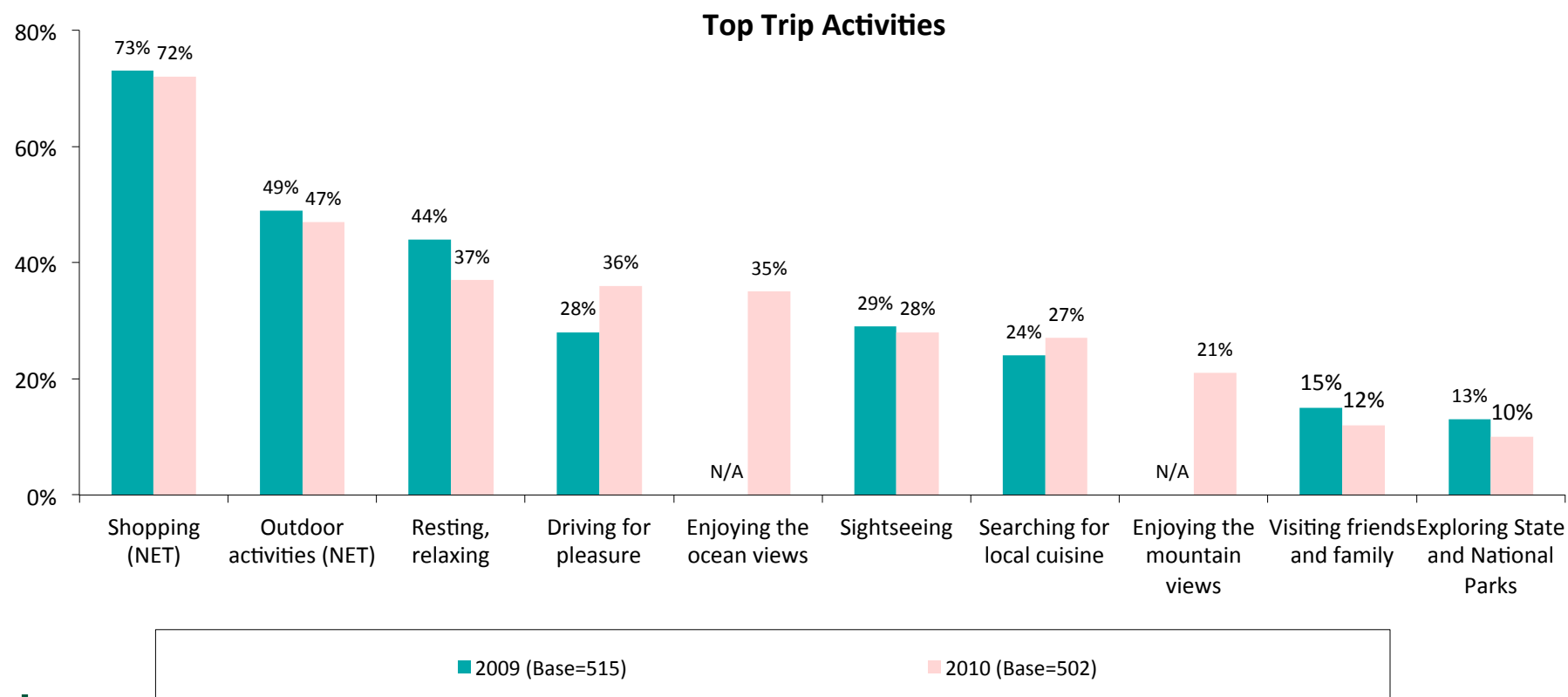
Primary Purpose of Overnight Leisure Trips: Canadian Visitors

- Not surprisingly, about a third of Canadian overnight visitors are looking to take advantage of the favorable exchange rate and convenient access to the U.S. market by visiting Maine in order to shop. However, a sizable number of Canadian overnight visitors are visiting Maine on a touring trip, or engaging in outdoor recreation. Touring, however, was reported as a primary trip purpose by fewer Canadians in 2010.



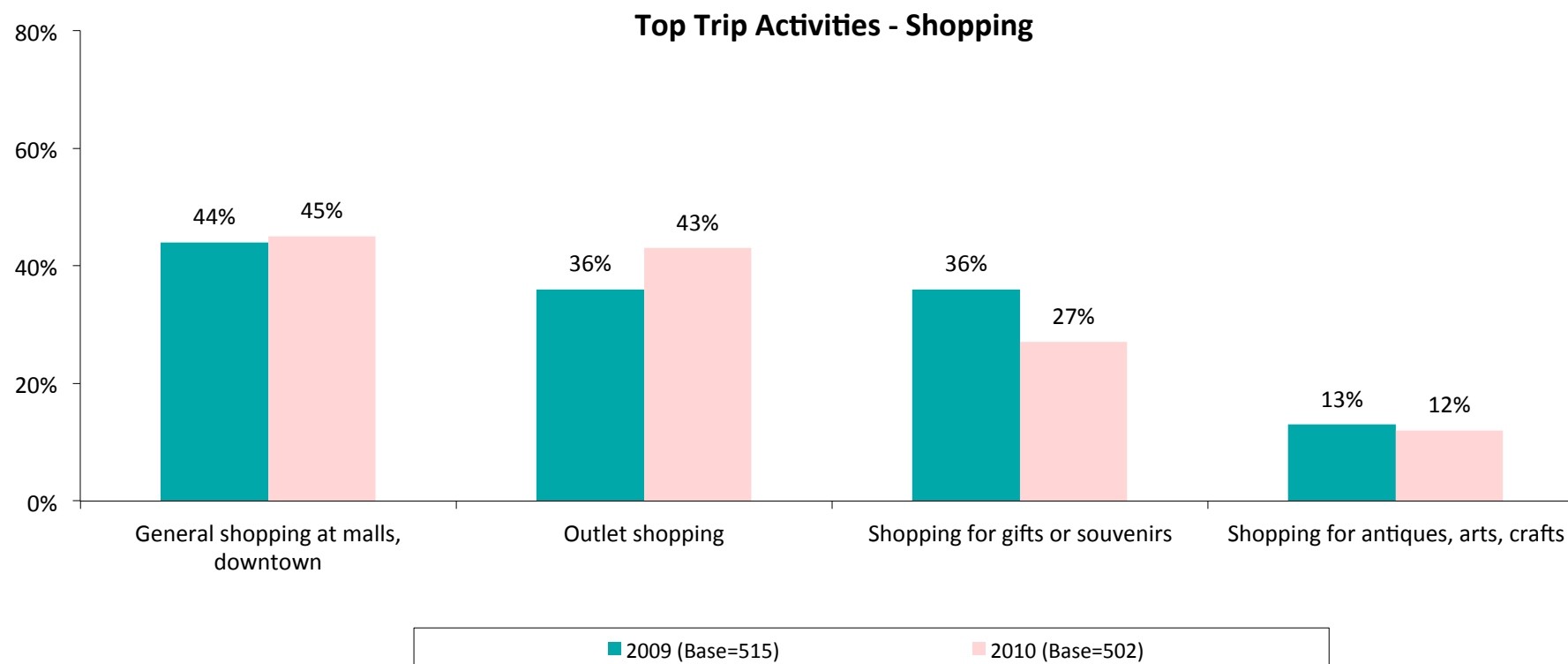
Overnight Leisure Trip Activities: Canadian Visitors

- As seen in the prior slide, shopping is a major activity for Canadian visitors, followed by outdoor activities and a host of options involving enjoying the scenic beauty of Maine.



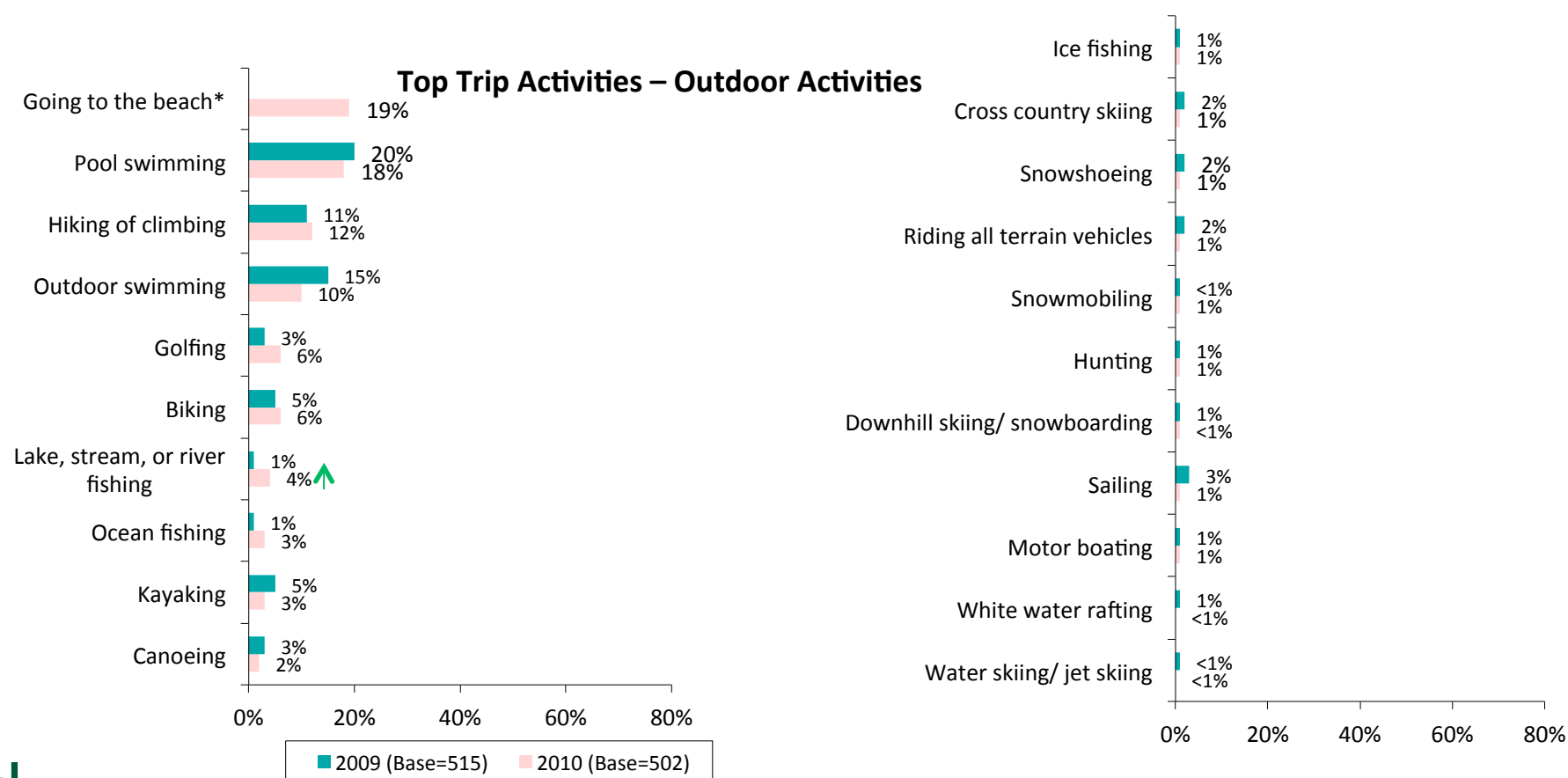
Overnight Leisure Trip Activities: Canadian Visitors - Shopping

- Among shopping options, Canadian visitors are likely to engage in general shopping in the malls and downtown areas as well as hitting the outlets.



Overnight Leisure Trip Activities: Canadian Visitors

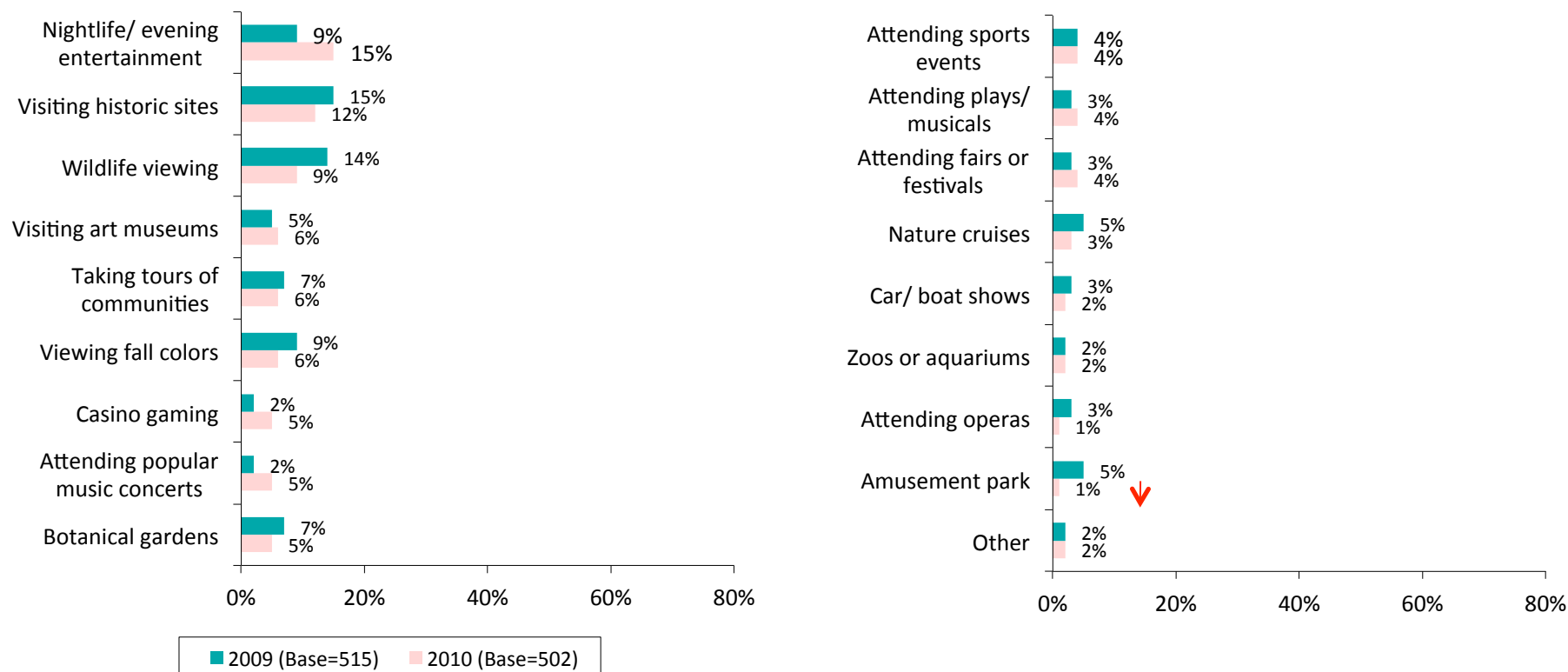
- Canadian overnight visitors like to take advantage of Maine's beaches and swimming opportunities. They are also likely to do some hiking or climbing. In general, Canadians enjoy the summertime outdoor recreation activities available in Maine.



Overnight Leisure Trip Activities: Canadian Visitors

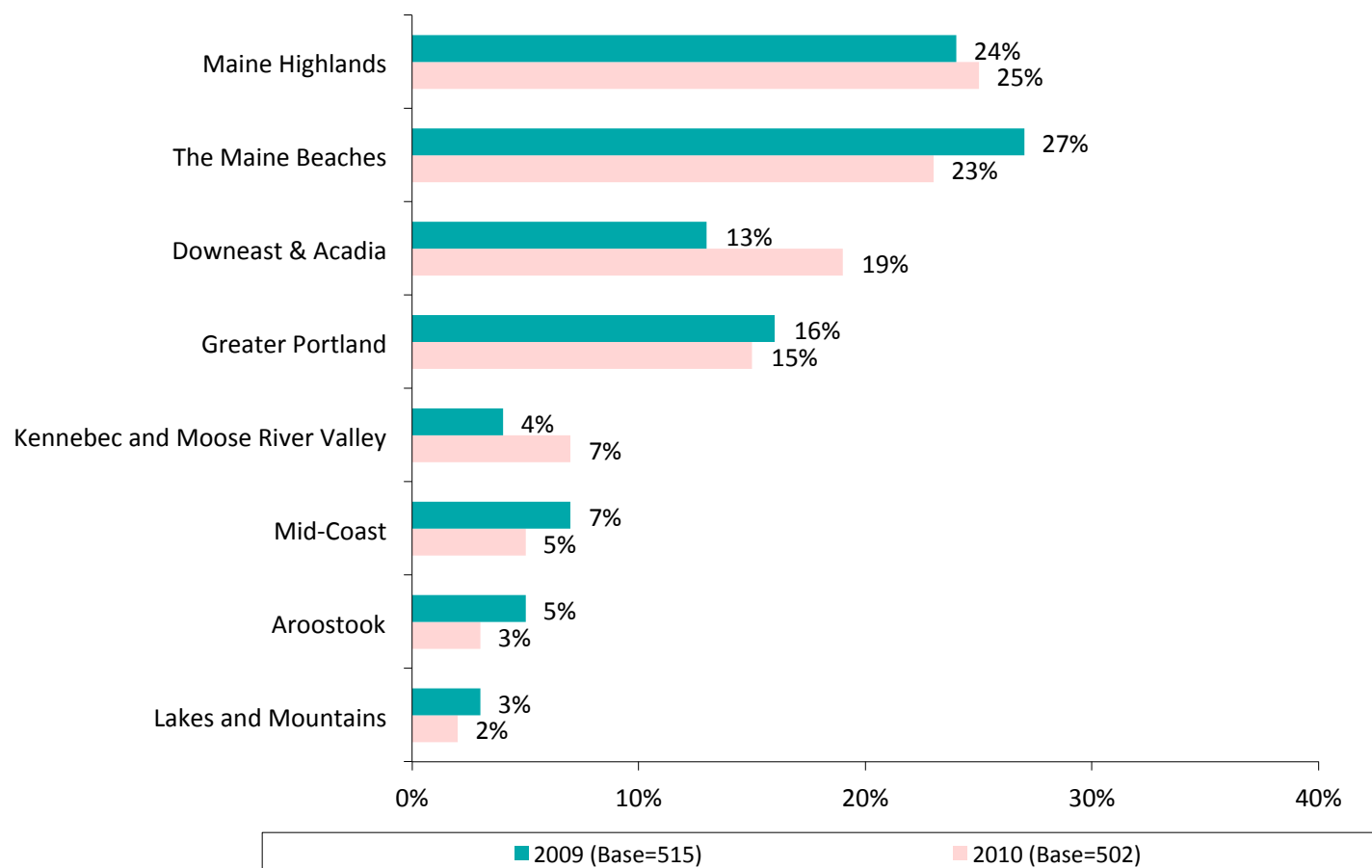
- A lesser proportion of Canadian visitors enjoy Maine's nightlife and historic sites, among a host of other activities.

Lower Utilized Trip Activities



Primary Region of Visit to Maine : *Canadian* Visitors

- Canadian Overnight visitors can be found in all regions of Maine, with The Maine Highlands the most visited region, followed by Maine Beaches, Downeast and Acadia, and Greater Portland and Casco Bay.



Day Leisure Visitor Demographics: *Canadian Visitors*

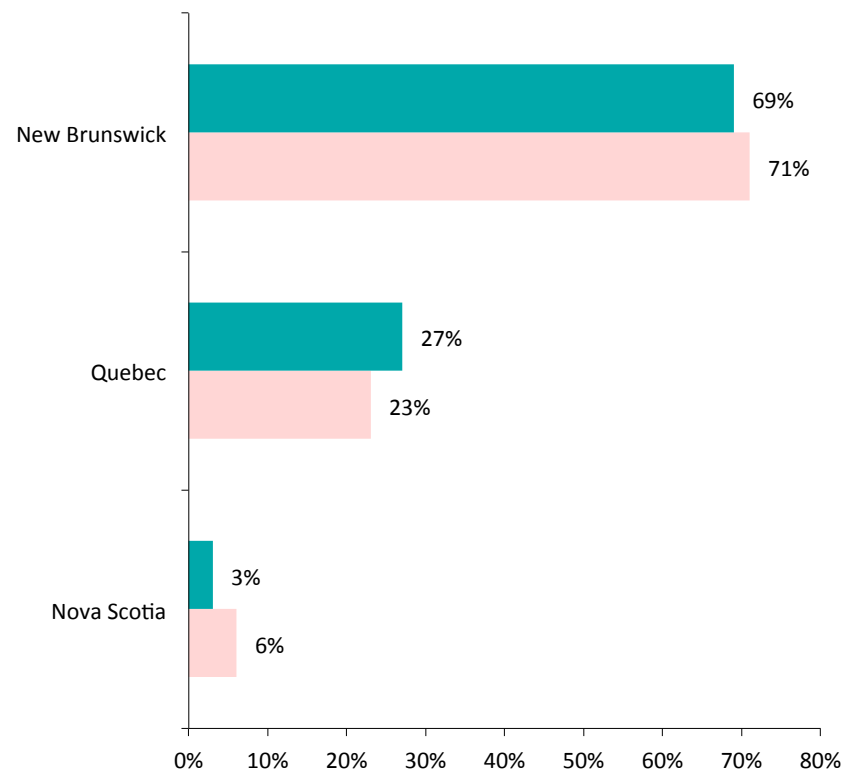
2010 Annual Report

- As with overnight visitors, Canadian day visitors tend to be older and have a higher household income than their American counterparts.

	2009 (Base=208)	2010 (Base=187)
Mean Age	44.9	47.0
< 35	27%	17% ↓
35 - 44	22%	23%
45 - 54	21%	32% ↑
55 +	30%	28%
Mean Income	\$91,200	\$100,800
< \$50,000	20%	18%
\$50,000 - \$99,000	49%	38%
\$100,000 +	30%	44%
Female	53%	39% ↓
College Degree or Higher	79%	72%
Married	60%	69%
Employed Full Time	70%	66%

Day Leisure Visitor Residence: *Canadian Visitors*

- The majority of Canadian day visitors are from New Brunswick, followed by Quebec and Nova Scotia.



■ 2009 (Base=208)

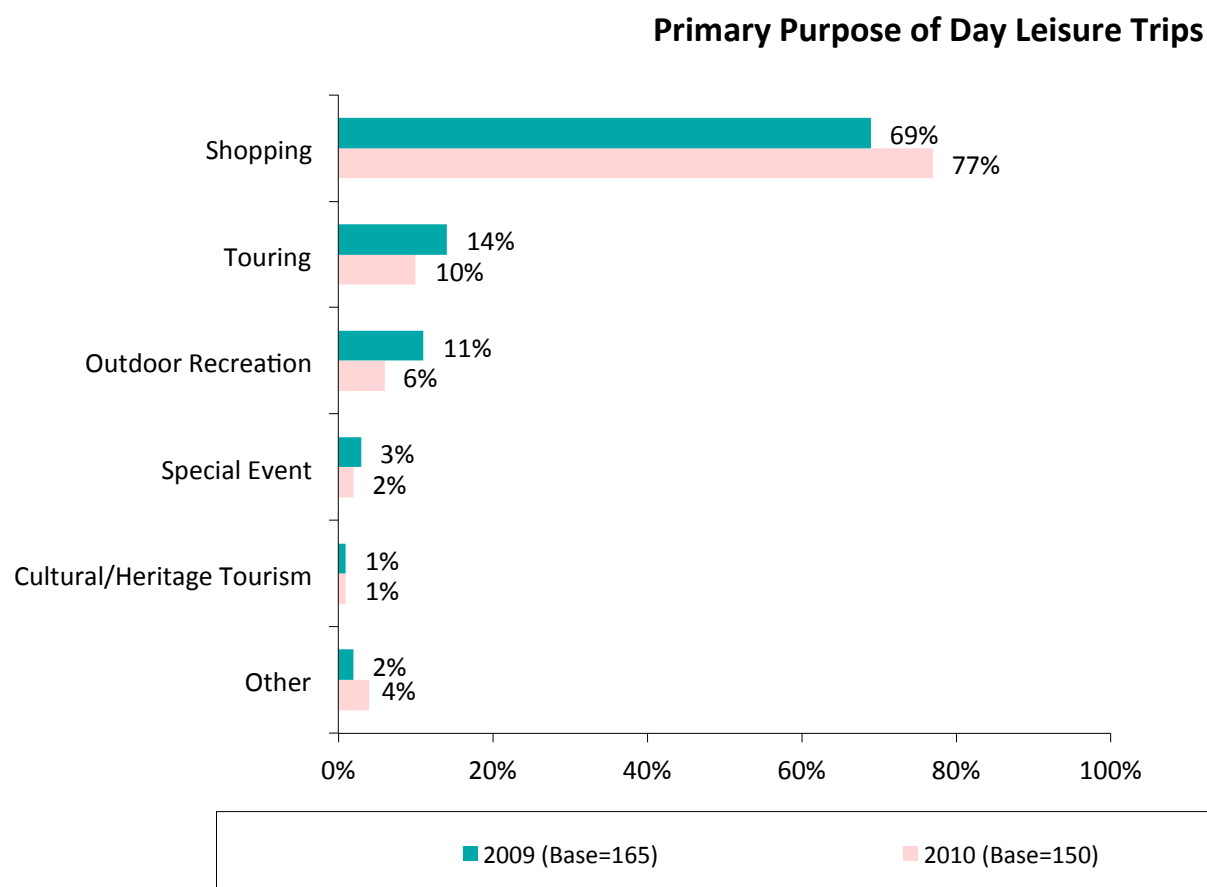
■ 2010 (Base=187)

Day Q1A. In what State or Province do you reside?

↑↓ notes significant difference at 95% confidence level

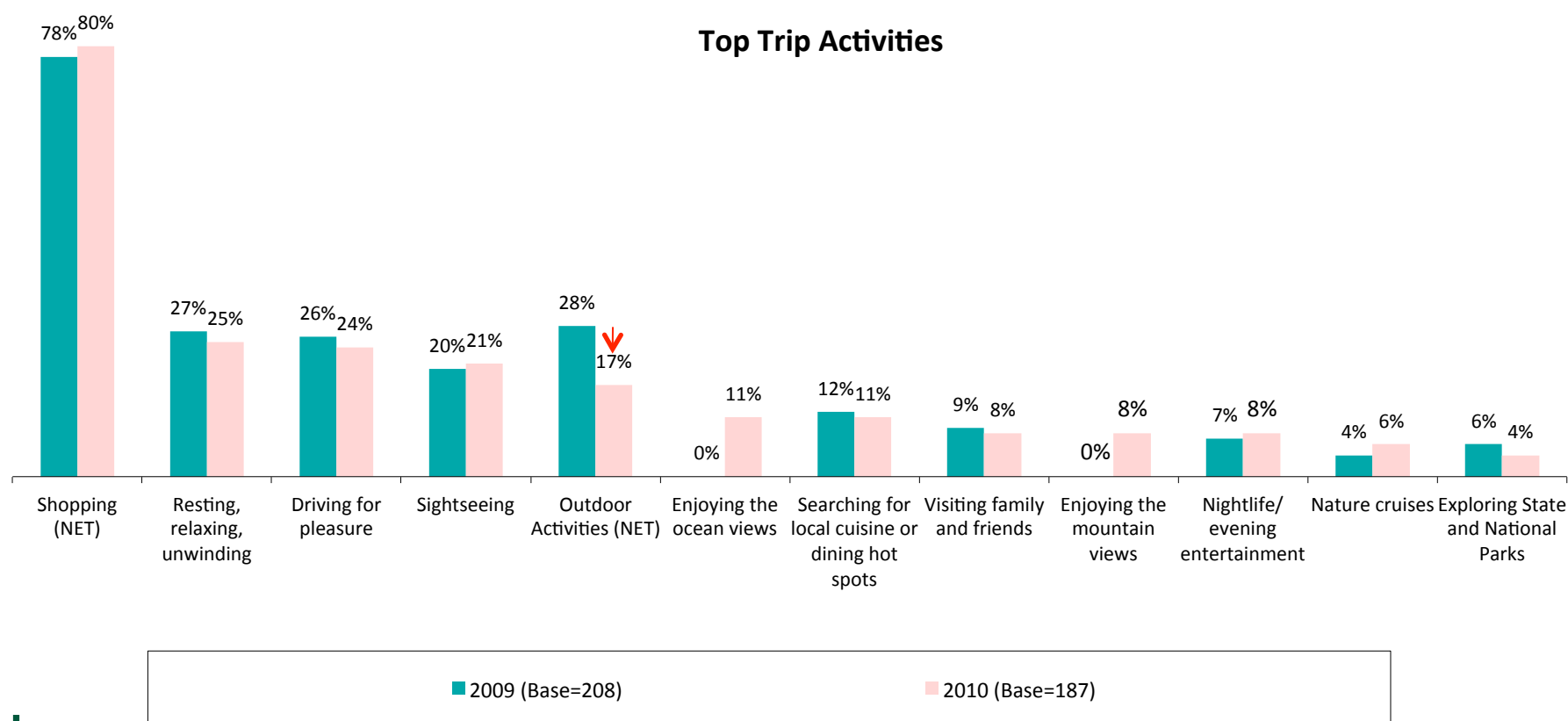
Primary Purpose of Day Leisure Trips: Canadian Visitors

- Not surprisingly, the vast majority of Canadian day trippers travel to Maine in order to shop.



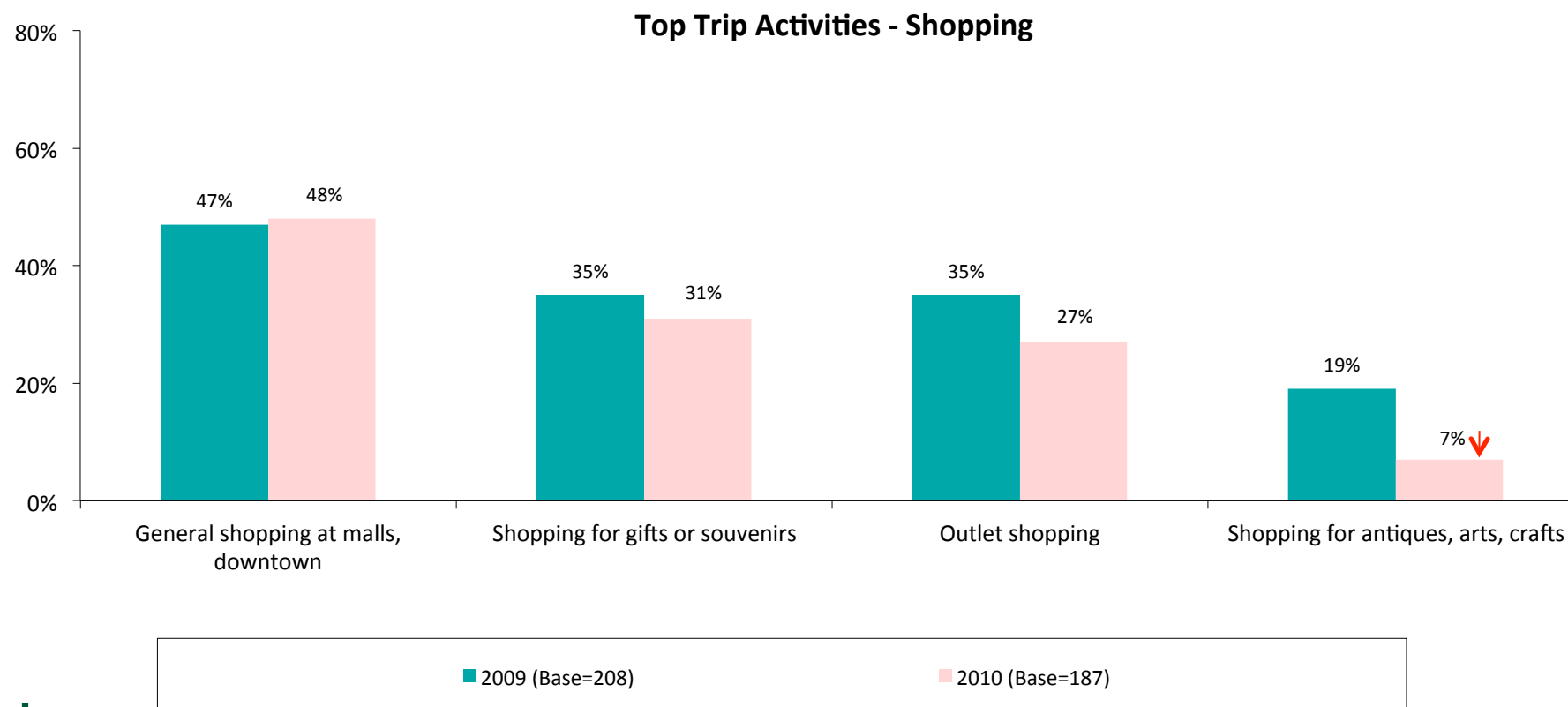
Day Leisure Trip Activities: Canadian Visitors

- Shopping dominates the list of activities engaged in by Canadian day visitors.



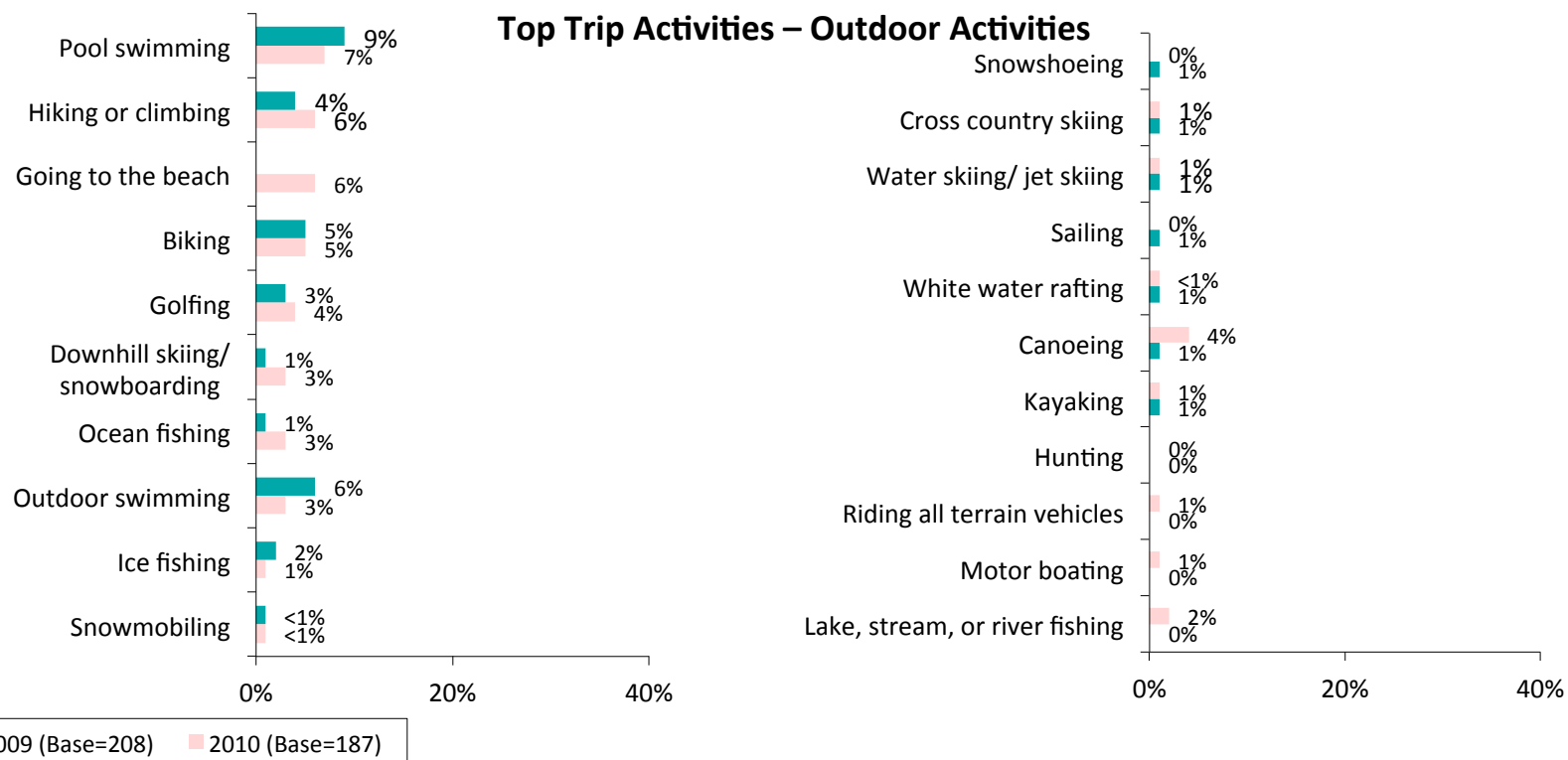
Day Leisure Trip Activities: Canadian Visitors

- While on their day trips to Maine, Canadians engage in a variety of shopping activities, hitting the malls and downtowns, outlets, and searching for gifts or souvenirs to take back to Canada.



Day Leisure Trip Activities: Canadian Visitors

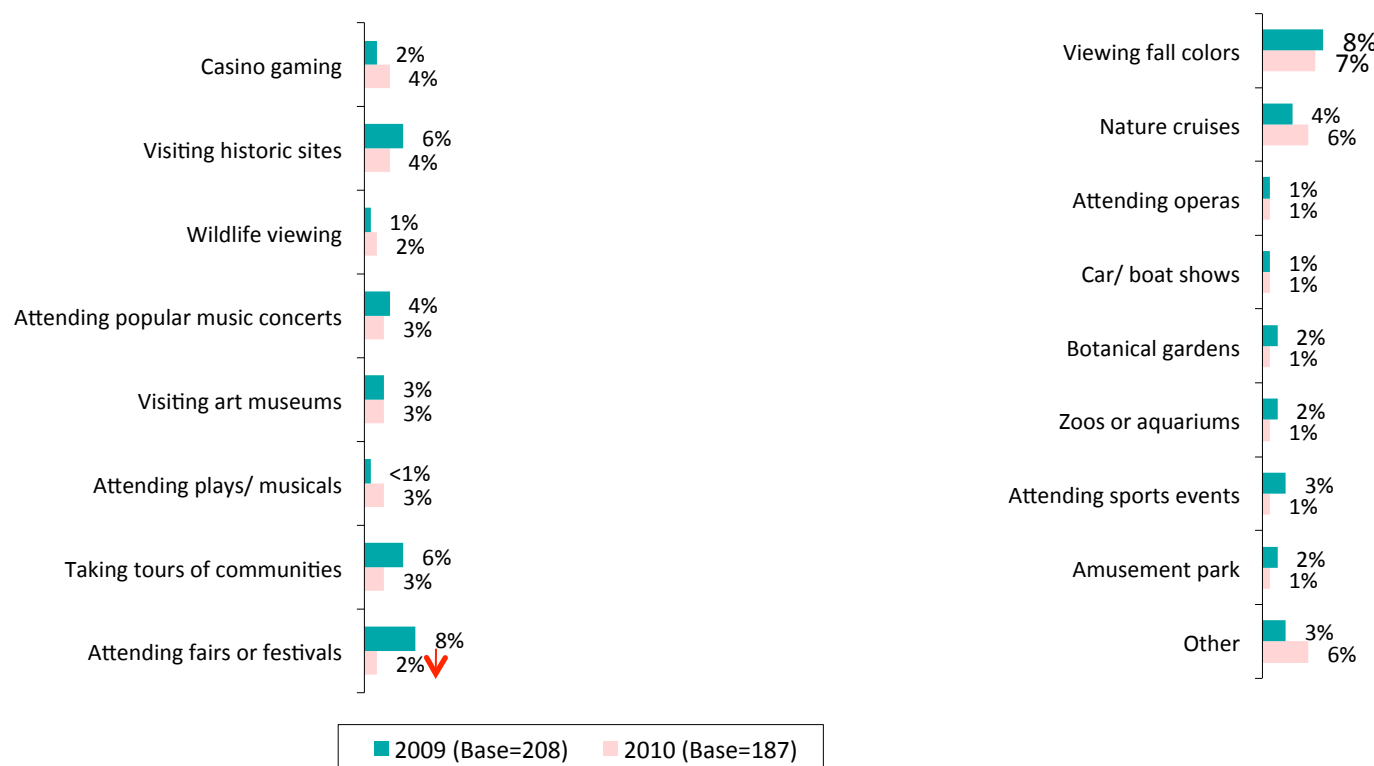
- With less than one in five Canadian Day visitors engaging in outdoor activities, participation is not overly strong in any of these categories.



Day Leisure Trip Activities: Canadian Visitors

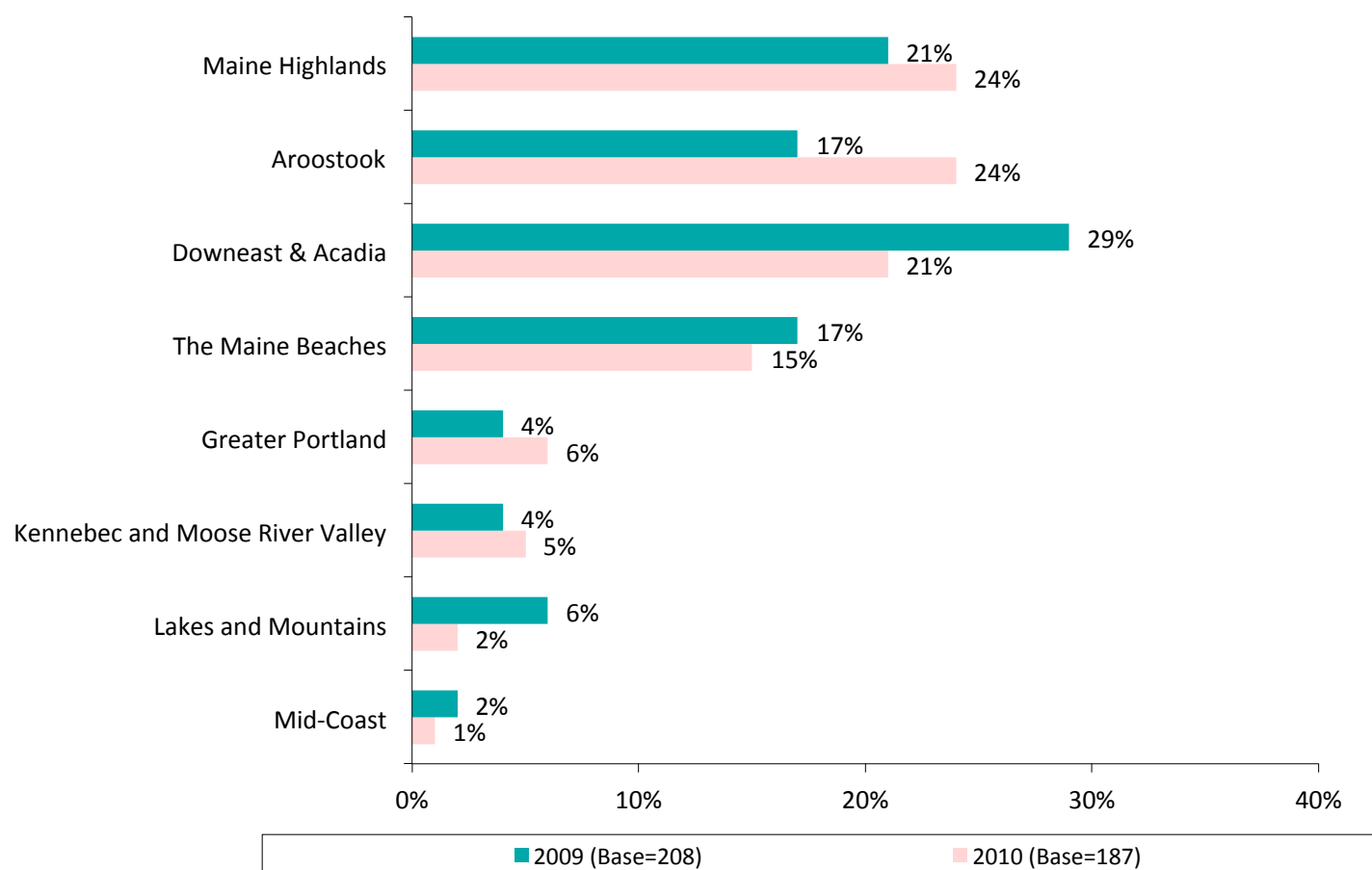
- Canadians were less likely to engage in the activities listed below. They were also less likely in 2010 (as compared to 2009) to attend a fair or festival in the state.

Lower Utilized Trip Activities



Primary Region of Visit to Maine : *Canadian Visitors*

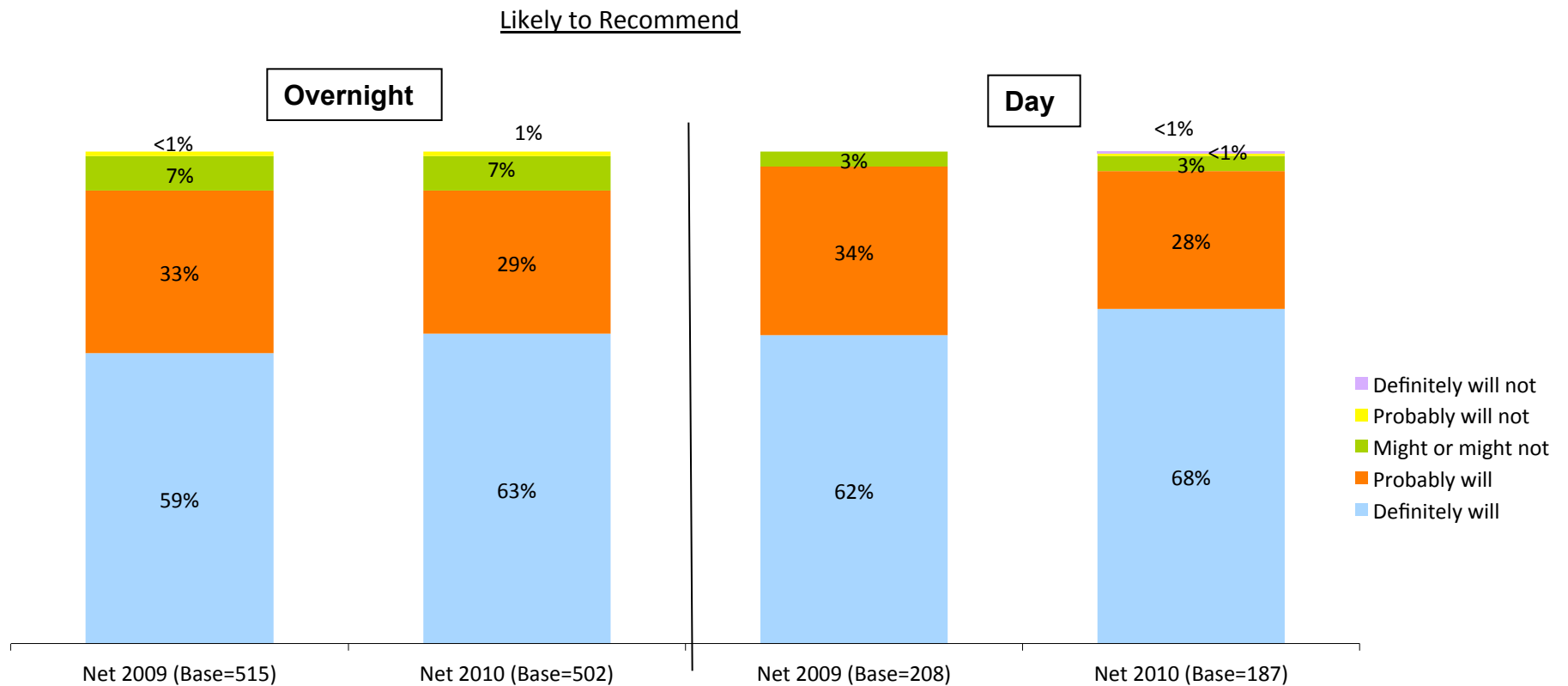
- Canadian Day trippers are most likely to spend their day in Maine Highlands, Aroostook, or Downeast & Acadia, with nearly 3 out of 4 visiting one of those three regions.



Likelihood to Recommend Maine – Canadian Visitors

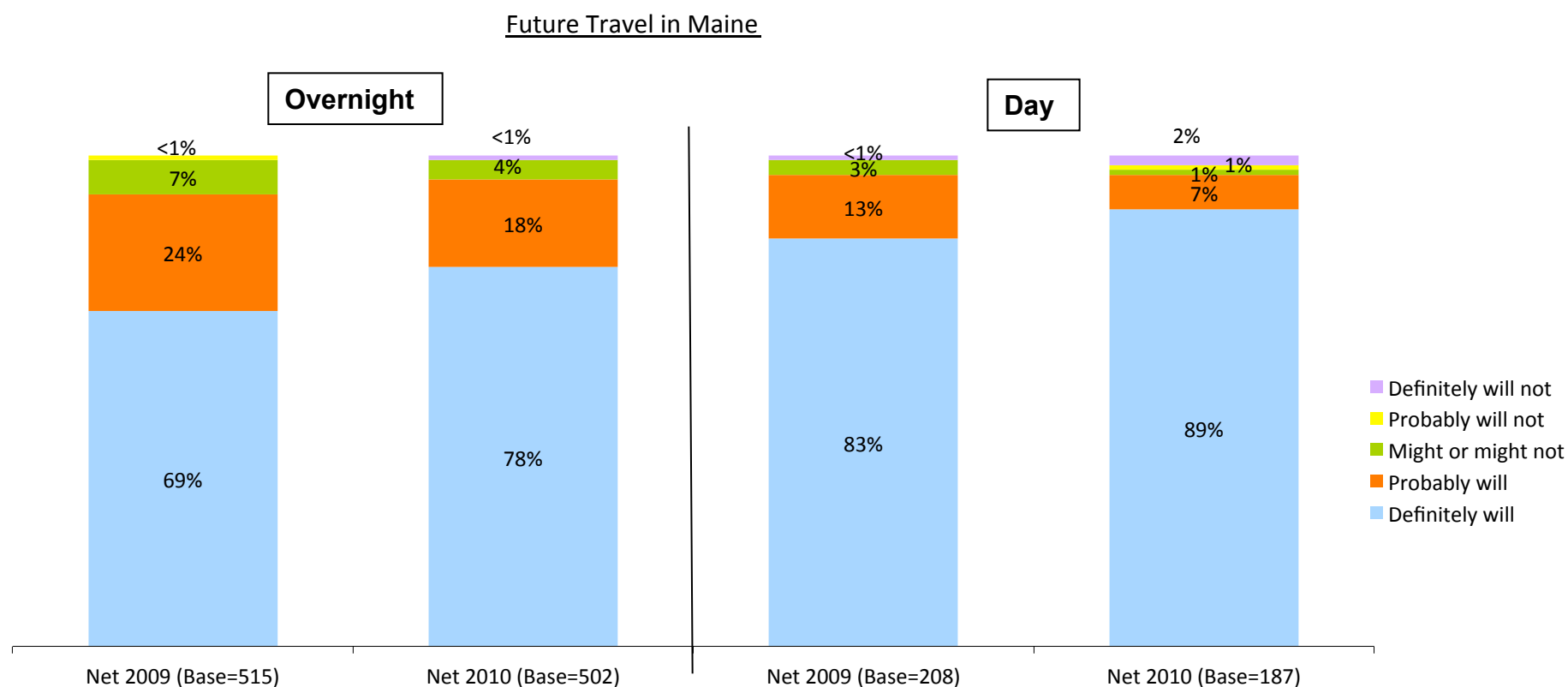
2010 Annual Report

- As with their U.S. counterparts, Canadian visitors are likely to recommend Maine as a travel destination to their friends and family.



Future Travel in Maine

- While likelihood to recommend is strong among Canadian visitors, likelihood to return is even stronger, with more than 9 in 10 reporting that they will probably or definitely travel to Maine in the future.



Conclusions



Conclusions

Opportunities:

- Buoyed by a strong summer, and helped also by an improved winter season, Maine saw a 7% increase in overnight visitor trips in 2010 compared to 2009. Certainly improved weather and a steadying economy helped the tourism season, but there are also signs that Maine's marketing efforts are paying off.
- Importantly, while the overall increase in Maine travel is good news, the increase in the share of new visitors creates even more reason for optimism. The net impact is a measureable improvement in Maine's success in attracting first time visitors to the state. Given the positive experiences of these visitors, the value in their word of mouth and repeat visitation will continue to provide benefits for Maine's tourism industry in the future.
- We have disproportionately been attracting new visitation from the Mid-Atlantic region over Eastern Canada – demonstrating that this Mid-Atlantic market is receptive to a Maine message. The Eastern Canadian market, conversely, is more made up of long-time visitors to the state. An opportunity exists to reinvigorate this market and drive fresh visitation from it. This is particularly important as the core Canadian visitors age Maine will need to attract young visitors to ensure strong Canadian visitation in the future.
- Outdoor activities and shopping continue to be two of the most important visitation activities in the state. Both of these activities remained the most widely cited trip activities for overnight and day visitors to the state in 2010. Canadians remain a critical shopping audience throughout the state, while New Englanders from outside of Maine remain a prime audience for outdoor activities.

Conclusions

Challenges:

- As the economy continues its slow recovery, travelers are still reluctant to spend at the same levels seen before the recession. Maine is considered by many of its visitors to provide good value, but this value image is seen more strongly among repeat visitors as compared to new. Therefore, the state will need to continue to find ways to offer an excellent experience at a reasonable price both to attract the spending averse, and to assure that value perceptions do not dissuade repeat visitation among those we have successfully brought in.
- Thus far in 2011, Maine has been fortunate to have had great summer weather. However, the Maine tourism market can be at risk if mother nature does not cooperate. It will be important to continue to enhance Maine's reputation as a destination with lots to do, to mitigate any risk in the eyes of travelers that a planned trip to Maine would be anything less than a great experience under any weather conditions.
- Additionally, while the strength of the Canadian dollar has been a great help in attracting Canadian shoppers to Maine, it will be important to ensure that Canadians are aware and excited about all of the benefits of a Maine vacation, as we will rely on this important market to continue to bring happy travelers to Maine in the future.

Business Travelers:

- As business people are increasingly seeking to learn about our destination while here for work, attracting more business travel could lead to more trip extensions (business/leisure combination trips) or drive interest for future leisure exploration of the state. Concerted effort with meeting planners could prove fruitful to expanding this travel category.

Appendix: Regional Insights



Regional Insights: The Maine Beaches



Overnight Leisure Visitor Demographics: *The Maine Beaches* 2010 Annual Report

- The demographic profile of overnight leisure visitors to the Maine Beaches did not experience any statistically significant year-over-year changes between 2009 and 2010.

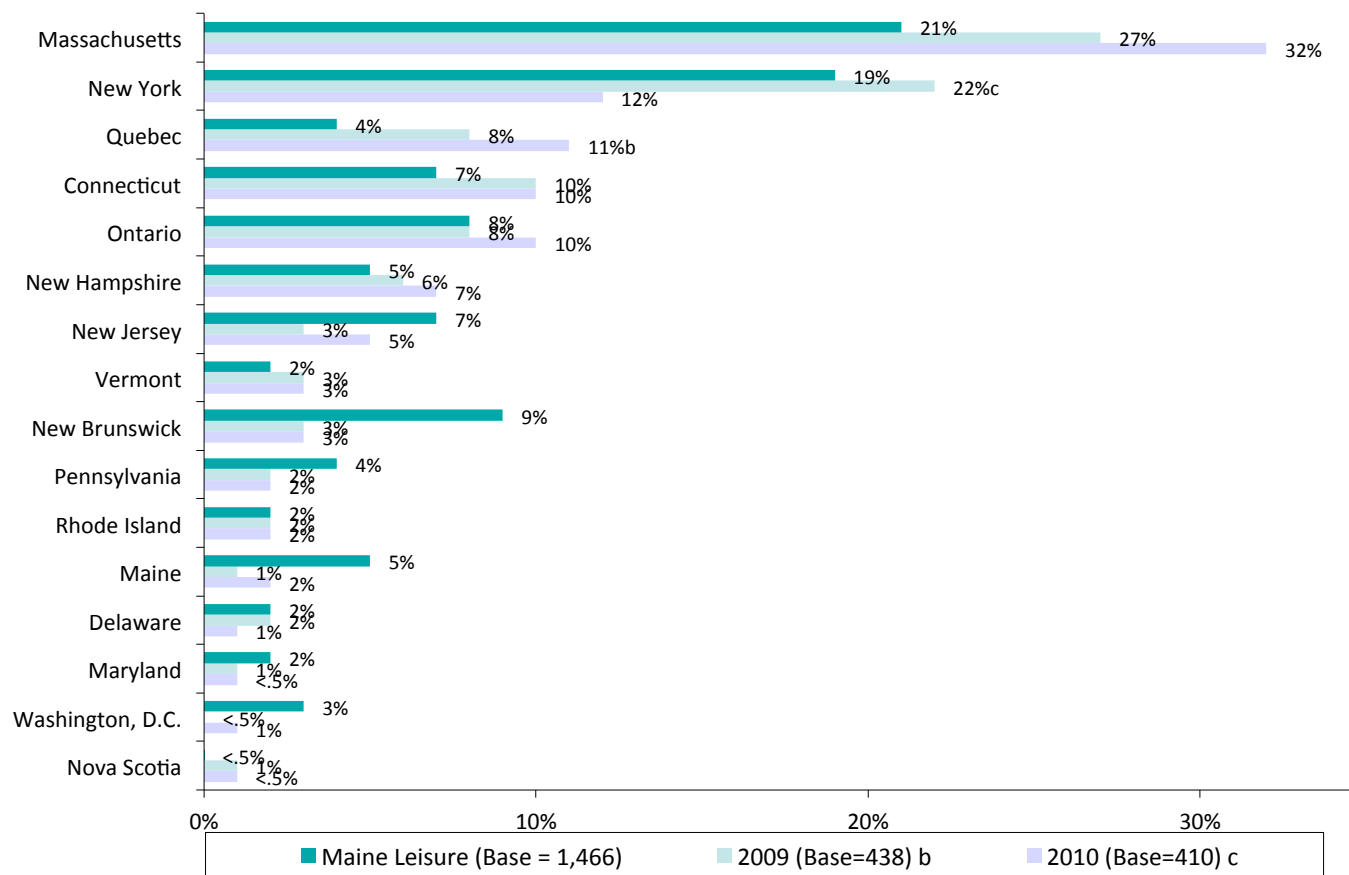
	Maine Leisure (Base=1,466)	2009 (Base=438)	2010 (Base=410)
Mean Age	45.2	45.6	48.2
< 35	28%	25%	19%
35 - 44	19%	21%	19%
45 - 54	24%	21%	27%
55 +	30%	33%	34%
Mean Income	\$106,700	\$102,700	\$104,300
< \$50,000	11%	8%	10%
\$50,000 - \$99,000	37%	36%	38%
\$100,000 +	36%	37%	37%
Female	47%	47%	53%
College Degree or Higher	76%	73%	71%
Married	61%	62%	64%
Employed Full Time	60%	57%	56%

Overnight Leisure Visitor Residence: *The Maine Beaches*

2010 Annual Report

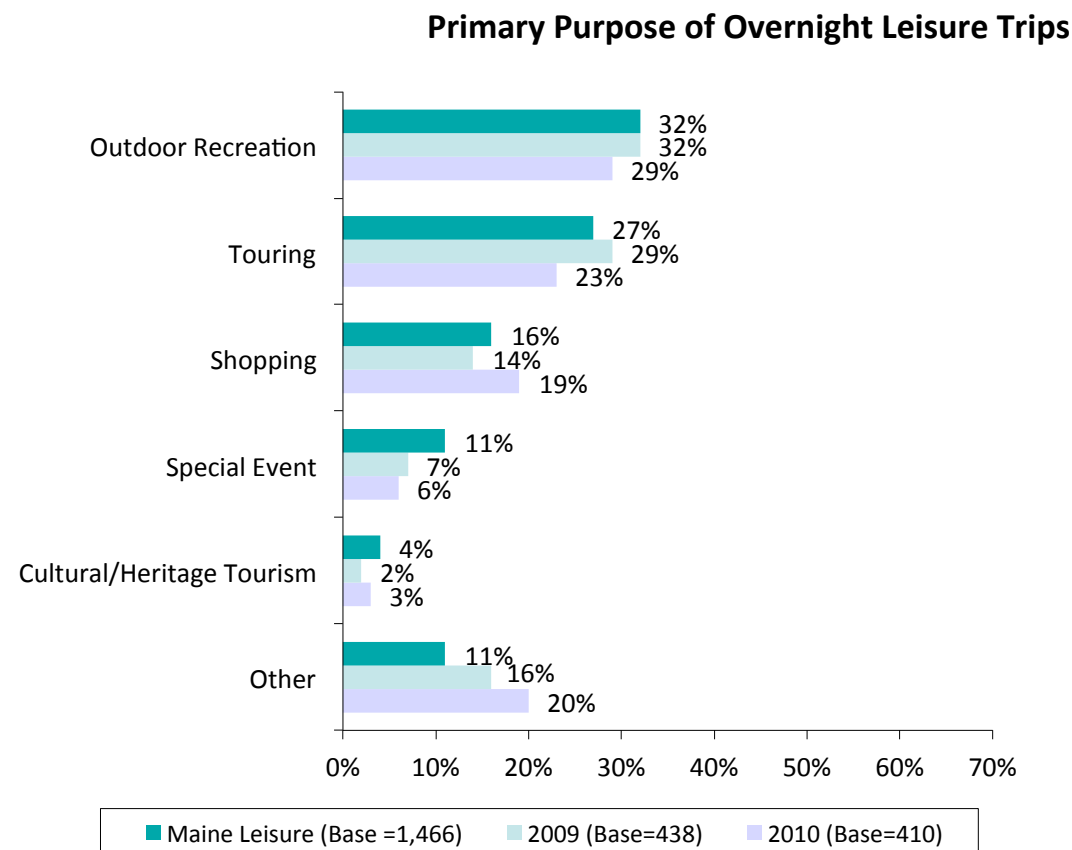
- Approximately one-third of overnight leisure visitors to the Maine Beaches in 2010 are from Massachusetts, making this the largest source of overnight visitors to the region. It's also notable to mention that there were significant year-over-year increases in the percentage of overnight visitors to this region from Quebec and a year-over-year decrease in the proportion of overnight visitors from New York.

Base: People who Live in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada



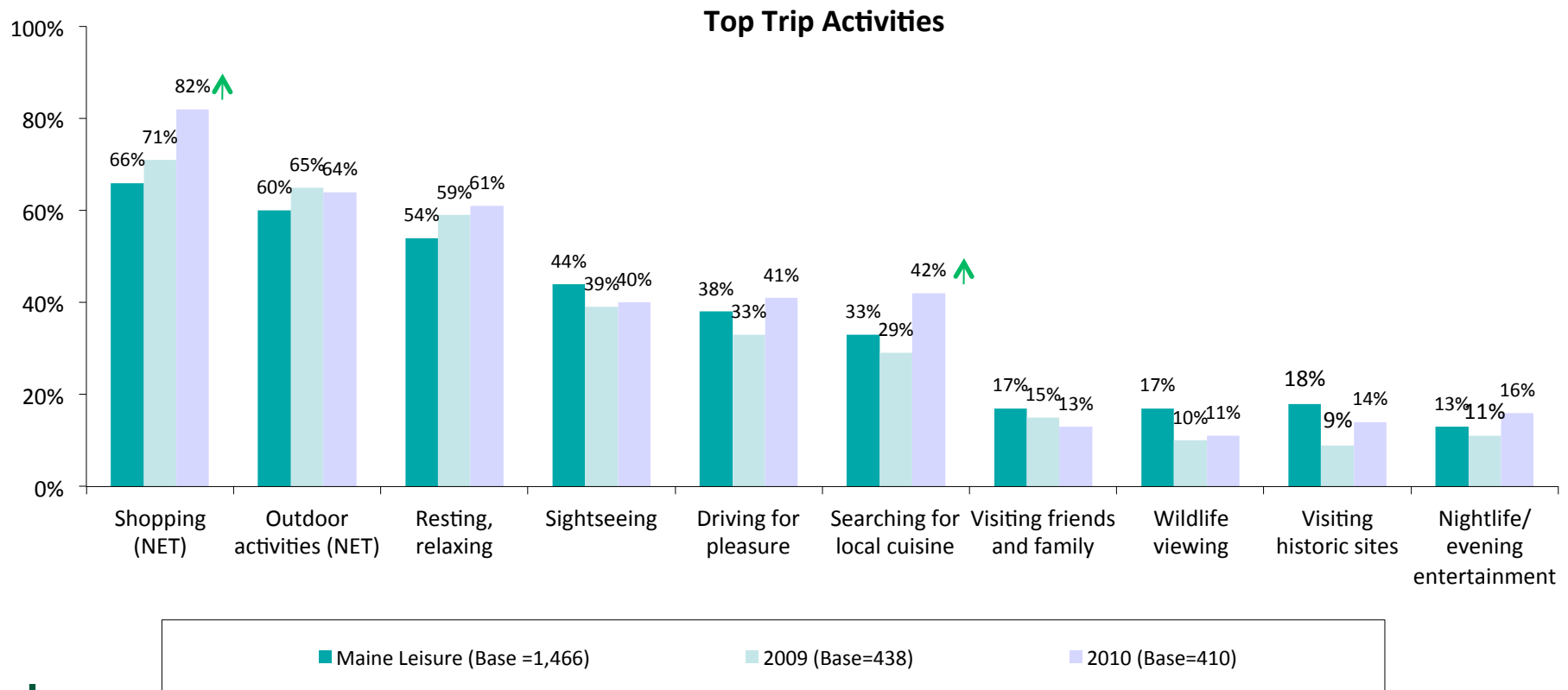
Primary Purpose of Overnight Leisure Trips: *The Maine Beaches* 2010 Annual Report

- Slightly less than three in ten overnight leisure visitors to Maine reported that the primary purpose of their trip was outdoor recreation -- which would include spending time on the beach. This was followed closely by touring and shopping.



Overnight Leisure Trip Activities: The Maine Beaches

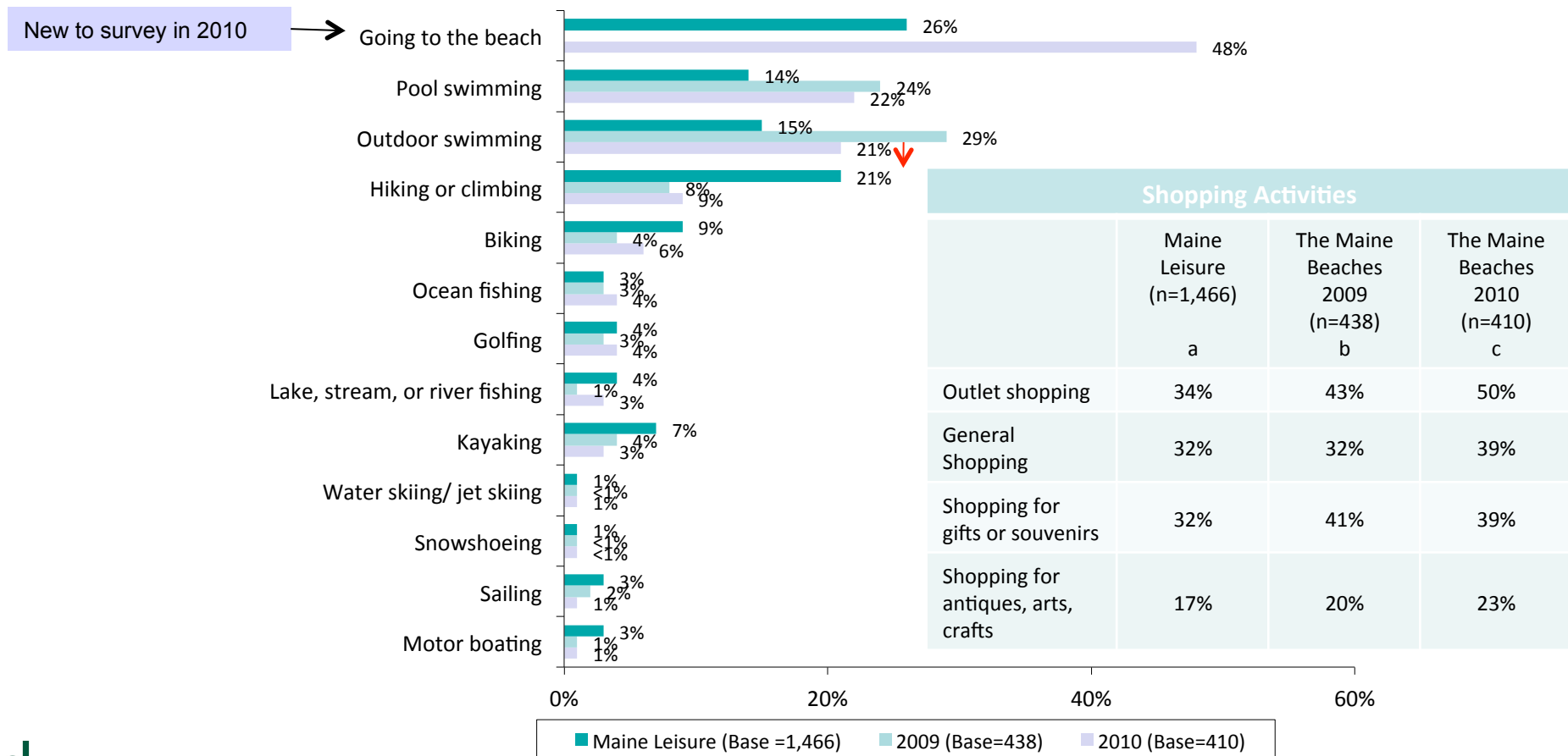
- The top overnight leisure trip activities for the Maine Beaches remained stable between 2009 and 2010 with the exception of increases in shopping and searching for local cuisine.



Overnight Leisure Outdoor Activities: The Maine Beaches

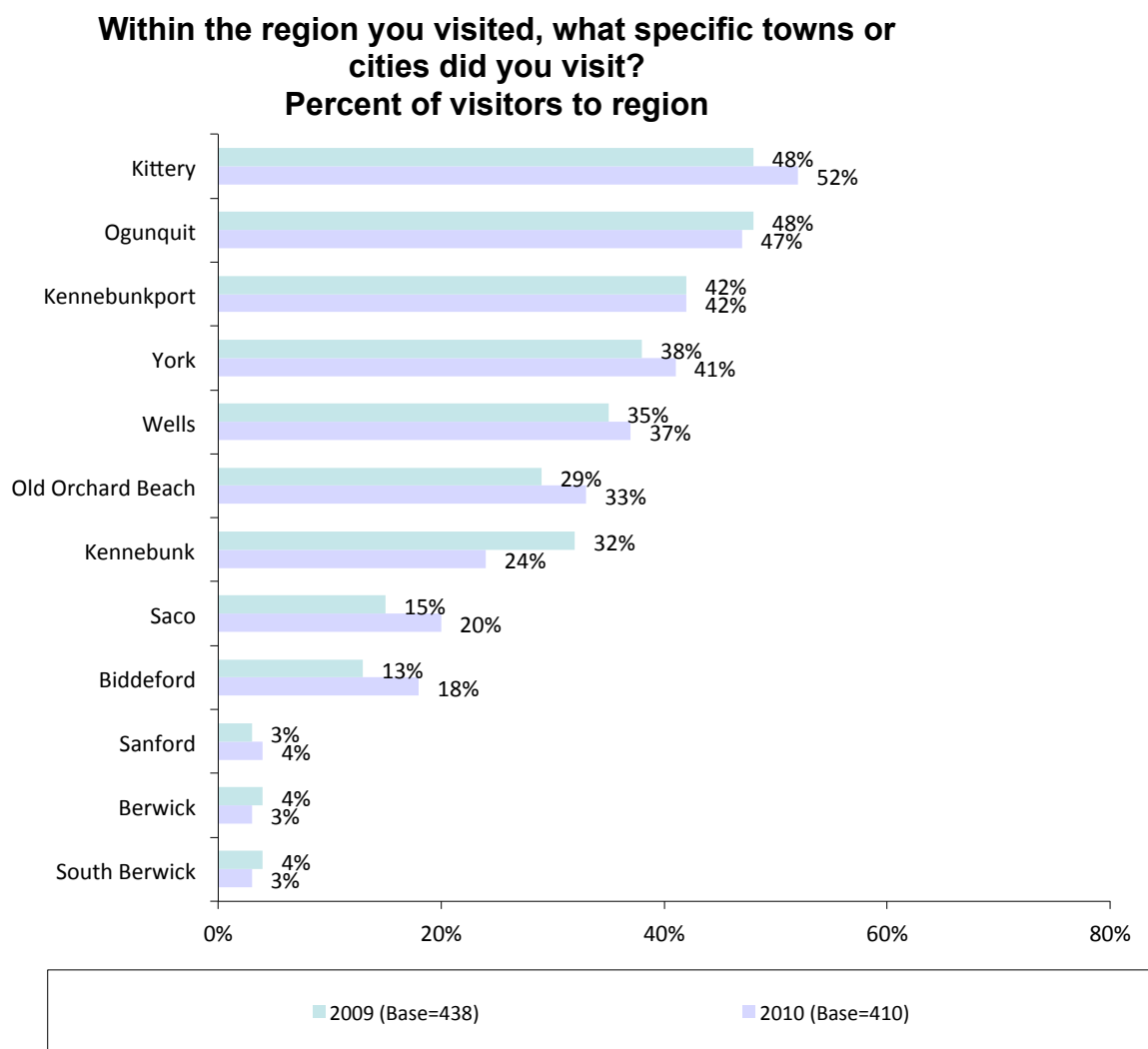
- Not surprisingly, half of the overnight visitors to the Maine Beaches went to the beach. Swimming was also a popular activity among these visitors, although outdoor swimming is down slightly from 2009.

Top Outdoor Activities



Overnight Leisure Visitor Towns & Cities Visited: *The Maine Beaches*

2010 Annual Report



Day Leisure Visitor Demographics: *The Maine Beaches*

2010 Annual Report

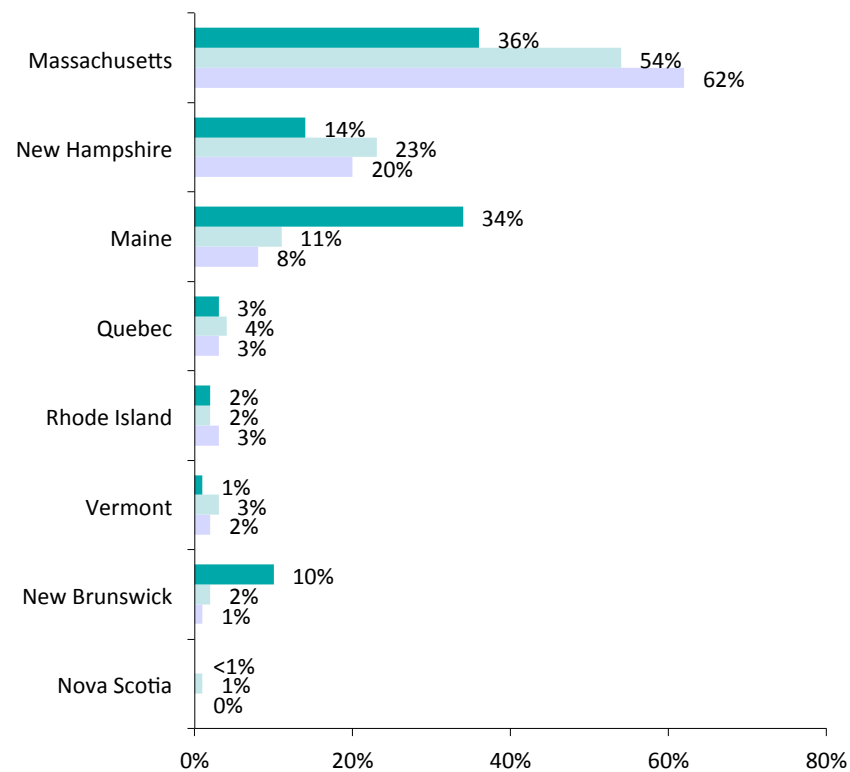
- Day visitors to the Maine Beaches in 2010 skewed a bit older than in 2009.

	Maine Leisure (Base=1,175)	2009 (Base=473) b	2010 (Base=504) c
Mean Age	46.8	43.8	47.1b
< 35	27%	35%	28%
35 - 44	17%	14%	17%
45 - 54	20%	24%	16%
55 +	36%	28%	40%
Mean Income	\$92,950	\$96,700	\$98,130
< \$50,000	21%	19%	19%
\$50,000 - \$99,000	43%	43%	41%
\$100,000 +	36%	38%	40%
Female	51%	54%	51%
College Degree or Higher	73%	75%	74%
Married	62%	57%	61%
Employed Full Time	58%	64%	57%

a,b,c notes significant year-over-year difference at 95% confidence level

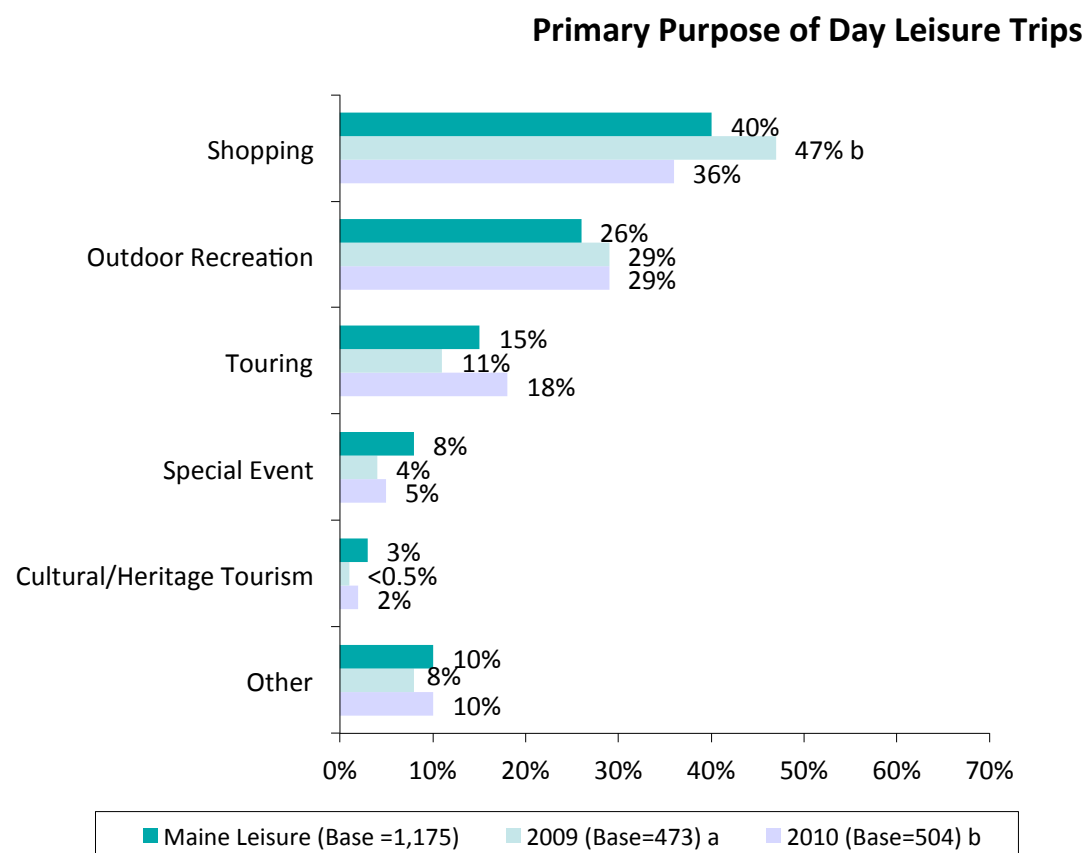
Day Leisure Visitor Residence: *The Maine Beaches*

- More than three of five day visitors to the Maine Beaches region are from Massachusetts, likely related to the high population in that state in conjunction with its close proximity to the region. It's important to note here that Massachusetts was also the largest source of overnight visitors to this region, underscoring the importance of Massachusetts to overall visitation to the Maine Beaches.



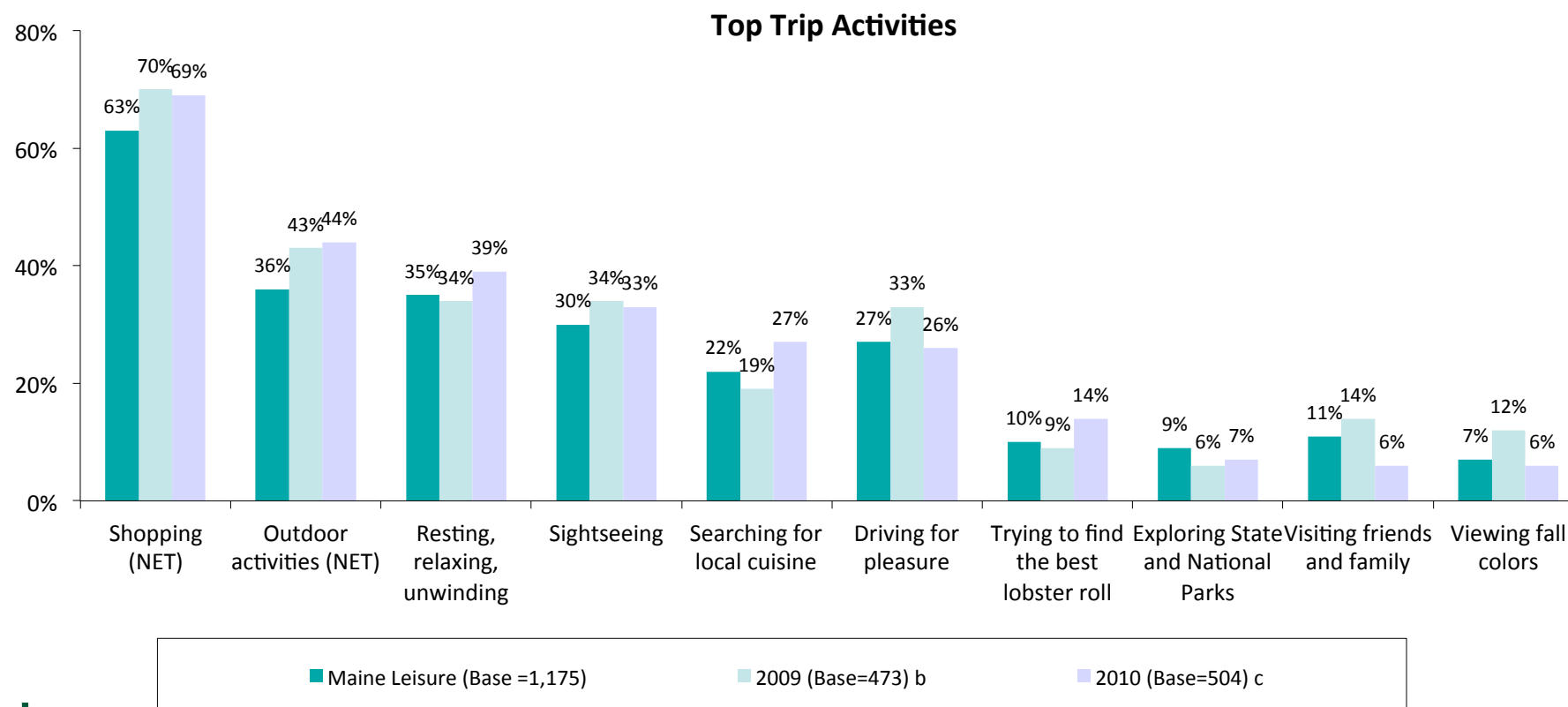
Primary Purpose of Day Leisure Trips: *The Maine Beaches*

- While outdoor recreation was the top primary leisure trip purpose among overnight visitors to the Maine Beaches, shopping was the top leisure trip purpose among day visitors despite experiencing a significant decrease in 2010.



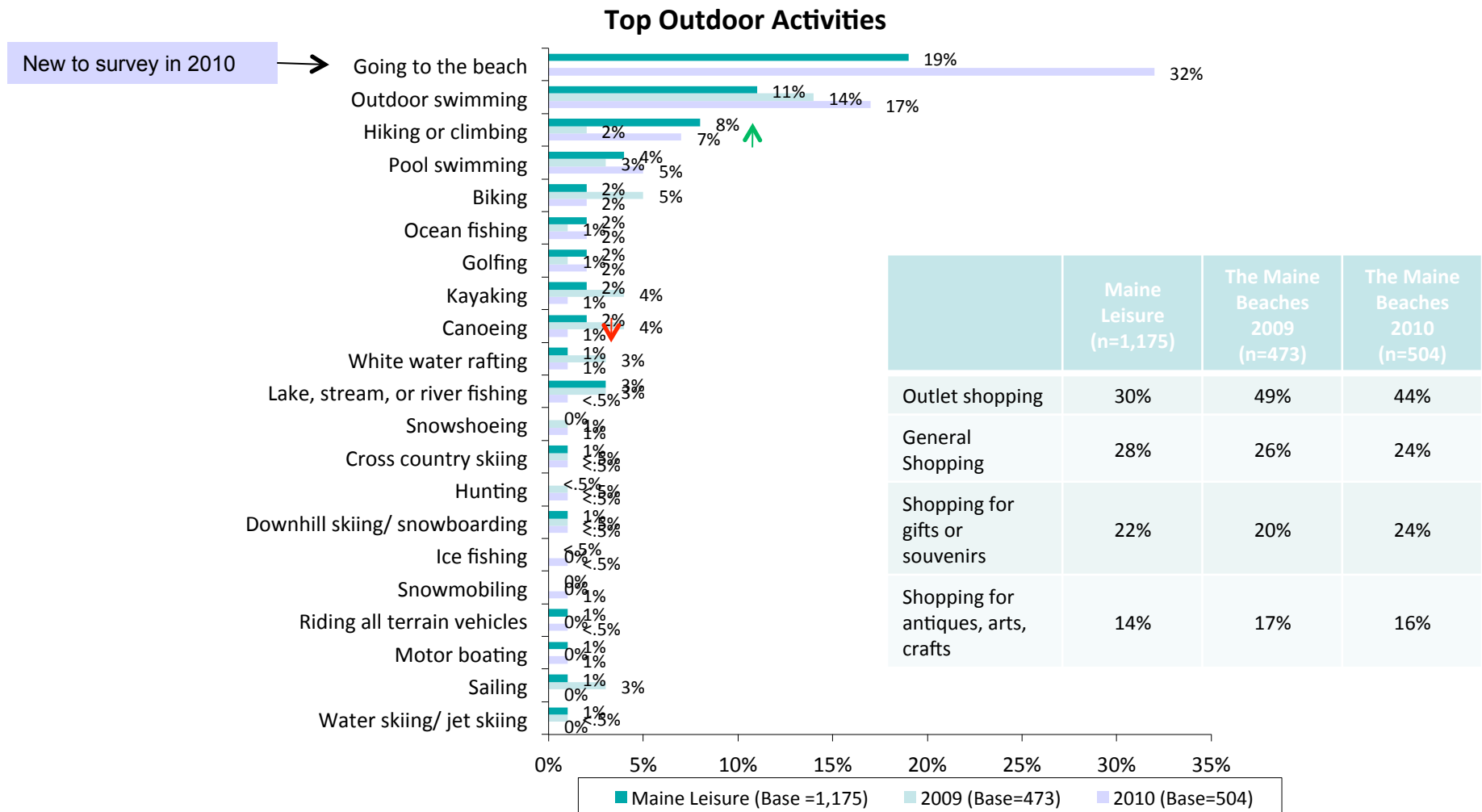
Day Leisure Trip Activities: The Maine Beaches

- Underscoring the importance of shopping as a day leisure trip activity for the Maine Beaches region, nearly seven in ten day visitors to the region reported that they went shopping during their day visit. Aside from shopping, slightly less than half of leisure day visitors reported that they engaged in outdoor recreation activities and/or resting/relaxing while on their leisure day trip to Southern Maine.



Day Leisure Outdoor Activities: *The Maine Beaches*

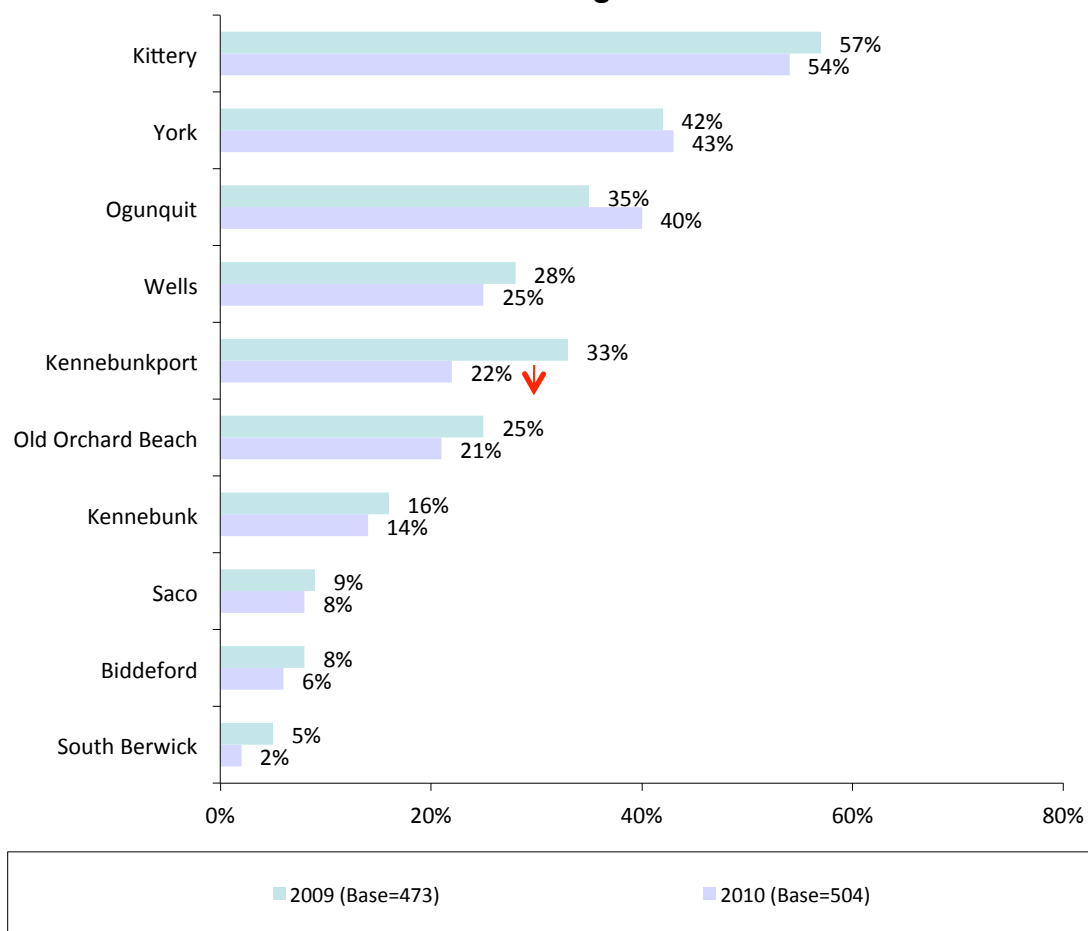
- Day visitors to the Maine Beaches in 2010 were more likely to hike or climb than in 2009, and somewhat less likely to spend time canoeing.



Day Leisure Visitor Towns & Cities Visited: 2010 Annual Report

The Maine Beaches

Within the region you visited, what specific towns or cities did you visit?
Percent of visitors to region



Regional Insights: Greater Portland and Casco Bay



Overnight Leisure Visitor Demographics: *2010 Annual Report* Greater Portland & Casco Bay

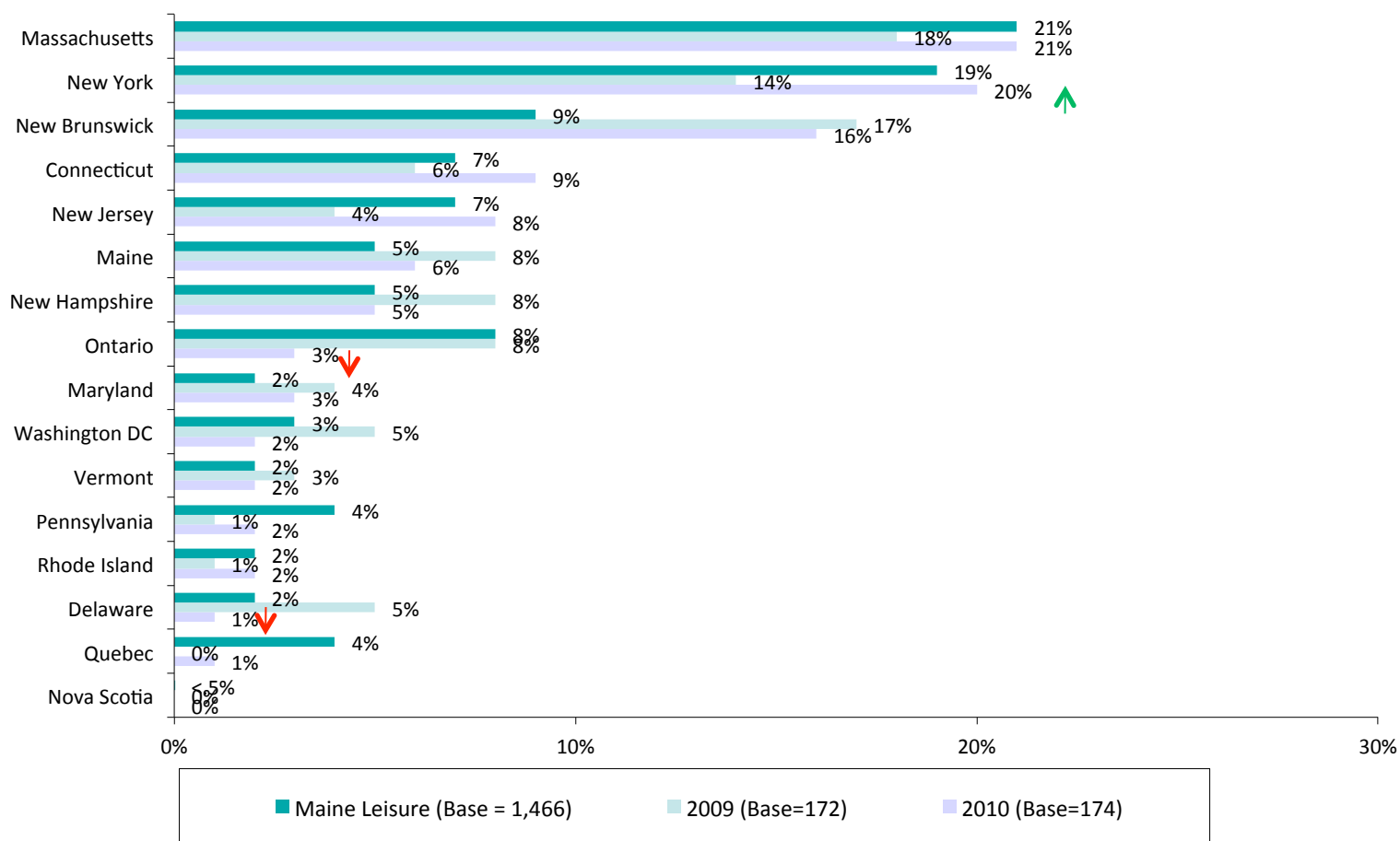
- Overnight leisure visitors to Greater Portland have a relatively high income level and are highly educated. Demographic measures were statistically stable from 2009 to 2010.

	Maine Leisure (Base=1,466)	2009 (Base=172)	2010 (Base=174)
Mean Age	45.2	46.8	44.9
< 35	28%	26%	25%
35 - 44	19%	16%	21%
45 - 54	24%	23%	26%
55 +	30%	35%	28%
Mean Income	\$106,700	\$112,300	\$116,100
< \$50,000	11%	12%	7%
\$50,000 - \$99,000	37%	30%	35%
\$100,000 +	36%	35%	38%
Female	47%	42%	49%
College Degree or Higher	76%	78%	80%
Married	61%	70%	60%
Employed Full Time	60%	63%	70%

Overnight Leisure Visitor Residence: Greater Portland & Casco Bay

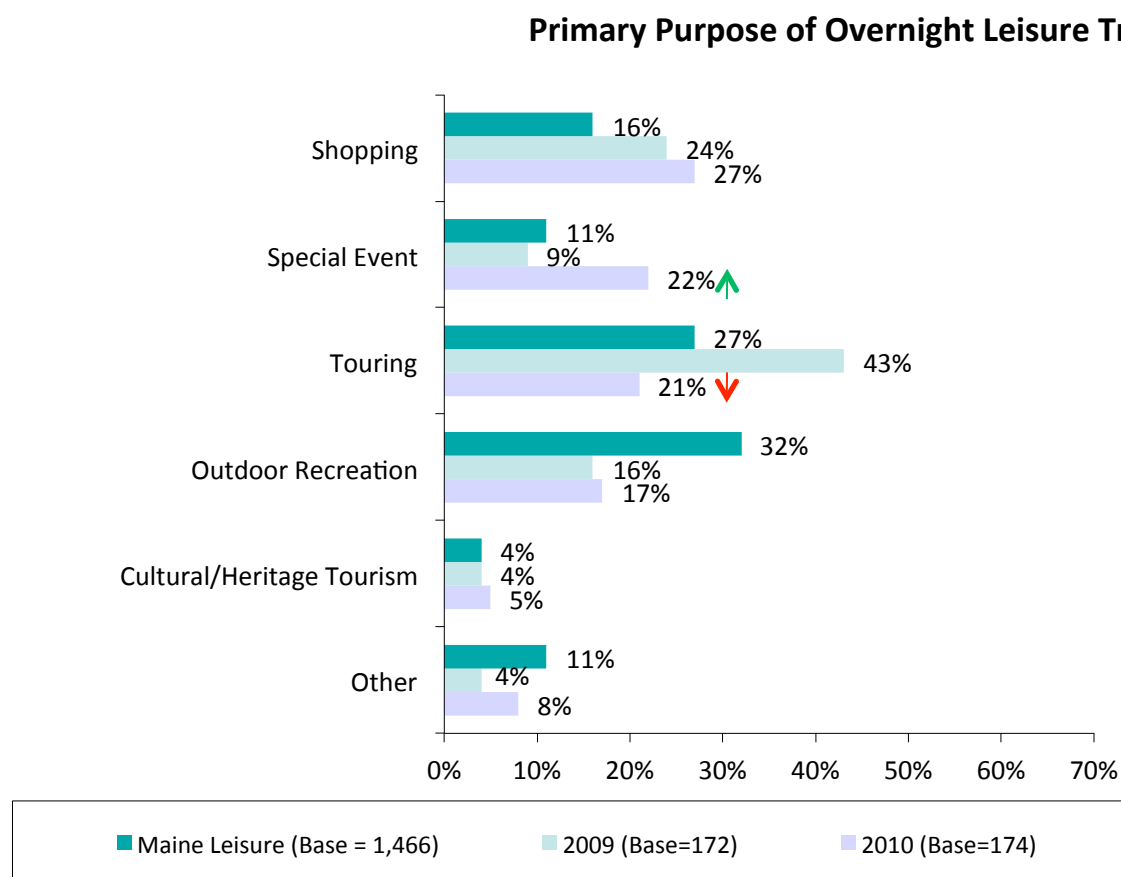
- Massachusetts, New York, and New Brunswick are the top three areas of residence for overnight leisure visitors to Greater Portland. It is important to note that there was a statistically significant year-over-year increase in the percentage of overnight leisure visitors to Greater Portland from New York. In contrast, there were significant decreases in the percent of overnight leisure visitors to this region from Ontario and Delaware.

Base: People who Live in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada



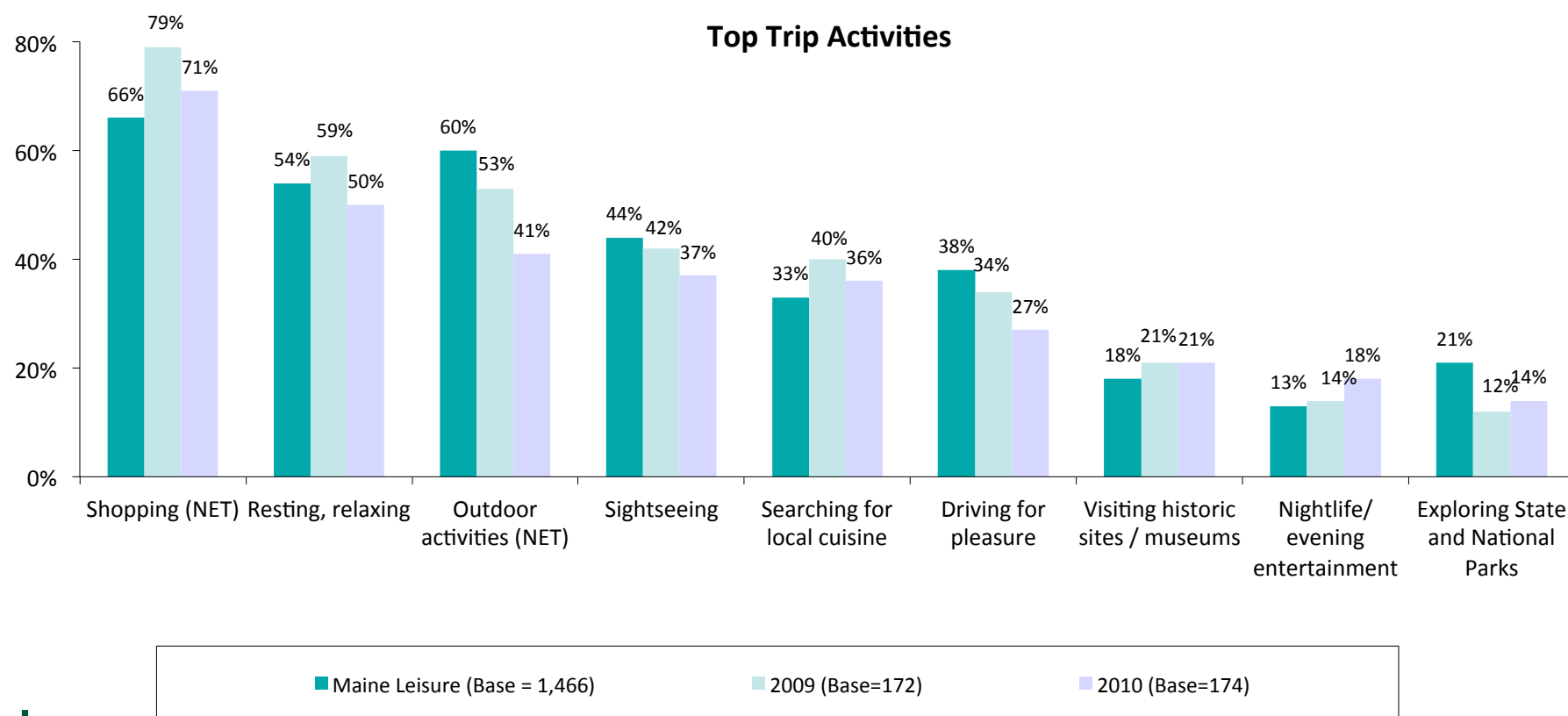
Primary Purpose of Overnight Leisure Trips: Greater Portland & Casco Bay

- Over one-quarter of overnight leisure visitors to Greater Portland reported that shopping was the primary purpose of their visit, making this the most widely cited primary trip purpose among this group. Notably, trips to Greater Portland for special events increased significantly from 2009 to 2010 while touring decreased.



Overnight Leisure Trip Activities: Greater Portland & Casco Bay

- Consistent with trip purpose, the most widely cited activity in Greater Portland was shopping. This is likely a reflection of the wide spectrum of shopping available in this region, including Freeport, the Old Port, and the Maine Mall in South Portland.

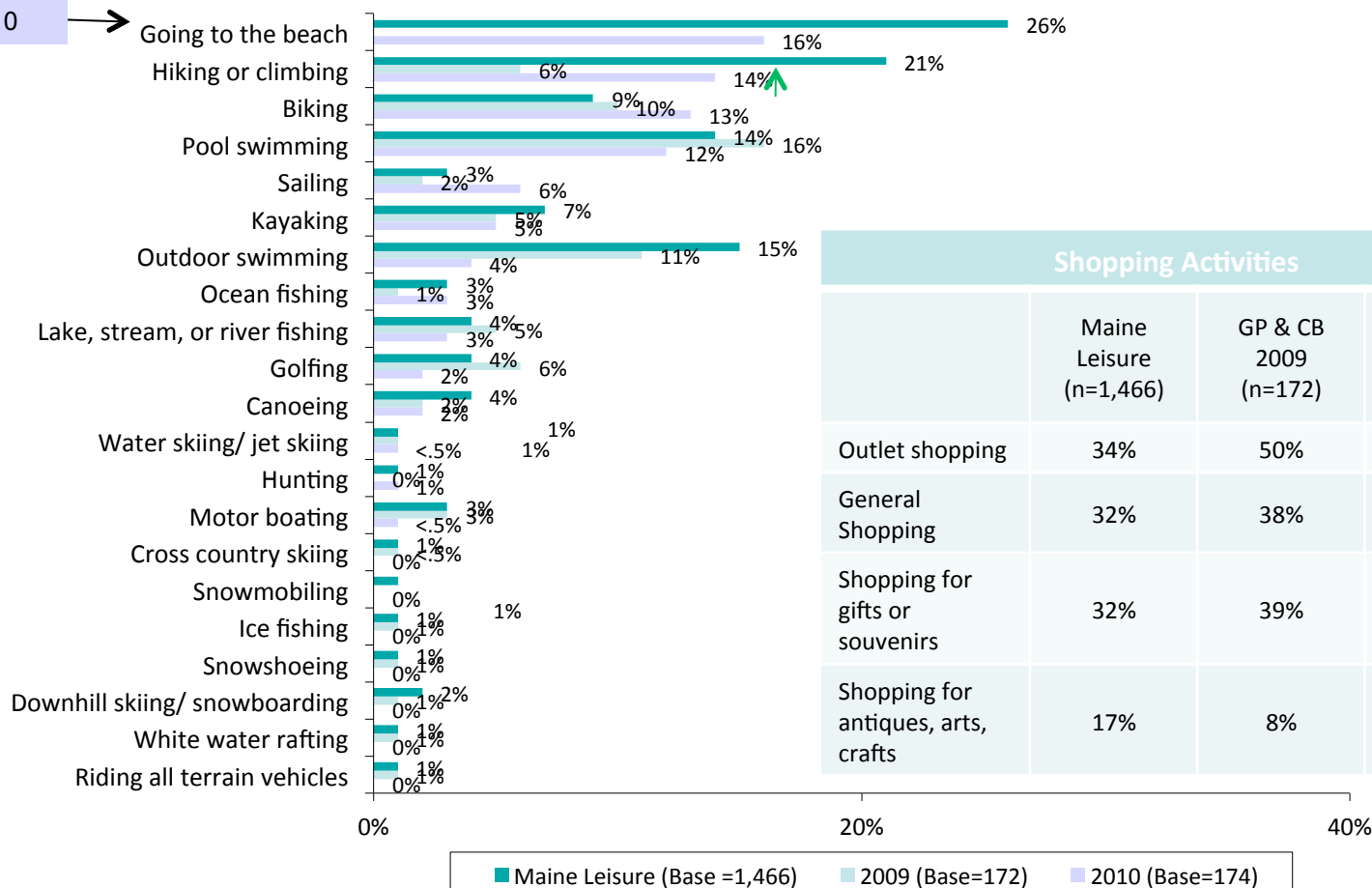


Overnight Leisure Trip Activities: *Greater Portland & Casco Bay*

- Visitors to the Greater Portland and Casco Bay region were more likely to engage in hiking or climbing in 2010 than they were in 2009.

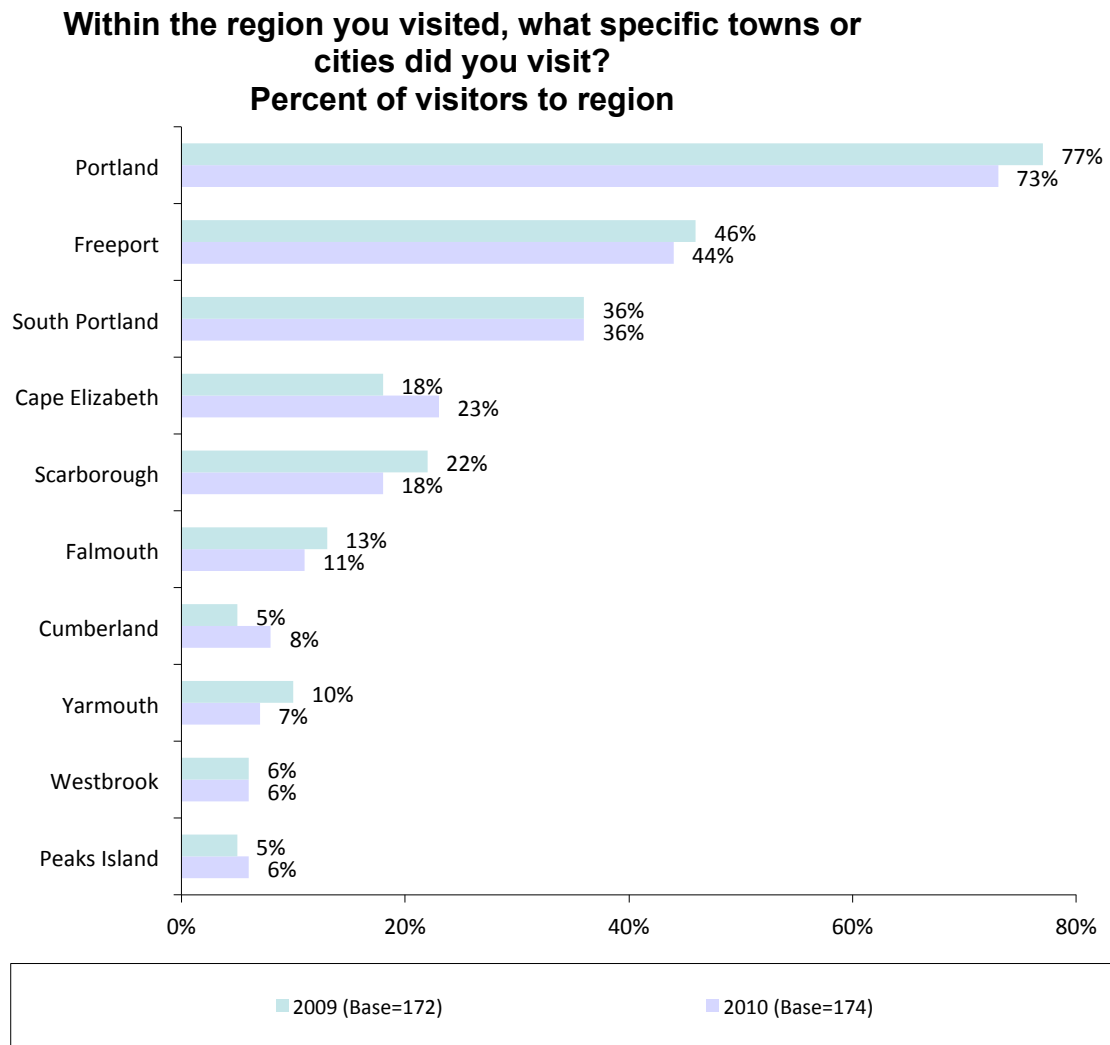
Top Trip Activities

New to survey in 2010 →




Overnight Leisure Visitor Towns & Cities Visited: *Greater Portland & Casco Bay*

2010 Annual Report



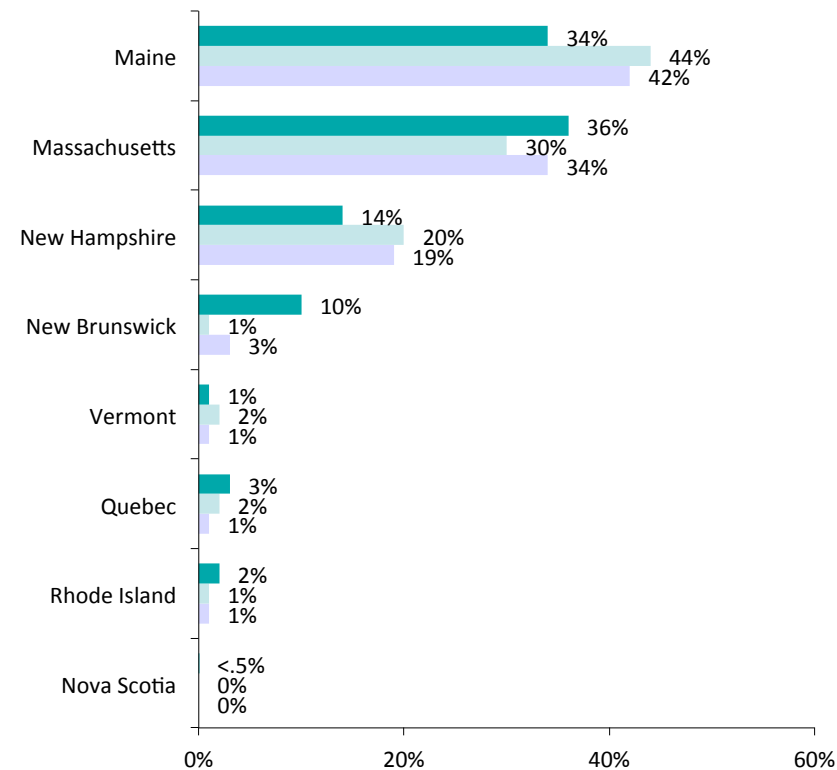
Day Leisure Visitor Demographics: Greater Portland & Casco Bay

- There was a significant year-over-year increase in the average household income of leisure day visitors to Greater Portland & Casco Bay.

	Maine Leisure (Base=1,175)	2009 (Base=186)	2010 (Base=167)
Mean Age	46.8	45.6	46.1
< 35	27%	32%	30%
35 - 44	17%	15%	14%
45 - 54	20%	16%	22%
55 +	36%	37%	34%
Mean Income	\$92,950	\$87,400	\$98,640
< \$50,000	21%	24%	19% 
\$50,000 - \$99,000	43%	46%	41%
\$100,000 +	36%	30%	40%
Female	51%	47%	55%
College Degree or Higher	73%	80%	80%
Married	62%	54%	63%
Employed Full Time	58%	54%	57%

Day Leisure Visitor Residence: Greater Portland & Casco Bay

- While Maine provides the largest percentage of leisure day visitors to Greater Portland, there is a strong contingent traveling from Massachusetts and New Hampshire.



■ Maine Leisure (Base = 1,175)

■ 2009 (Base=186)

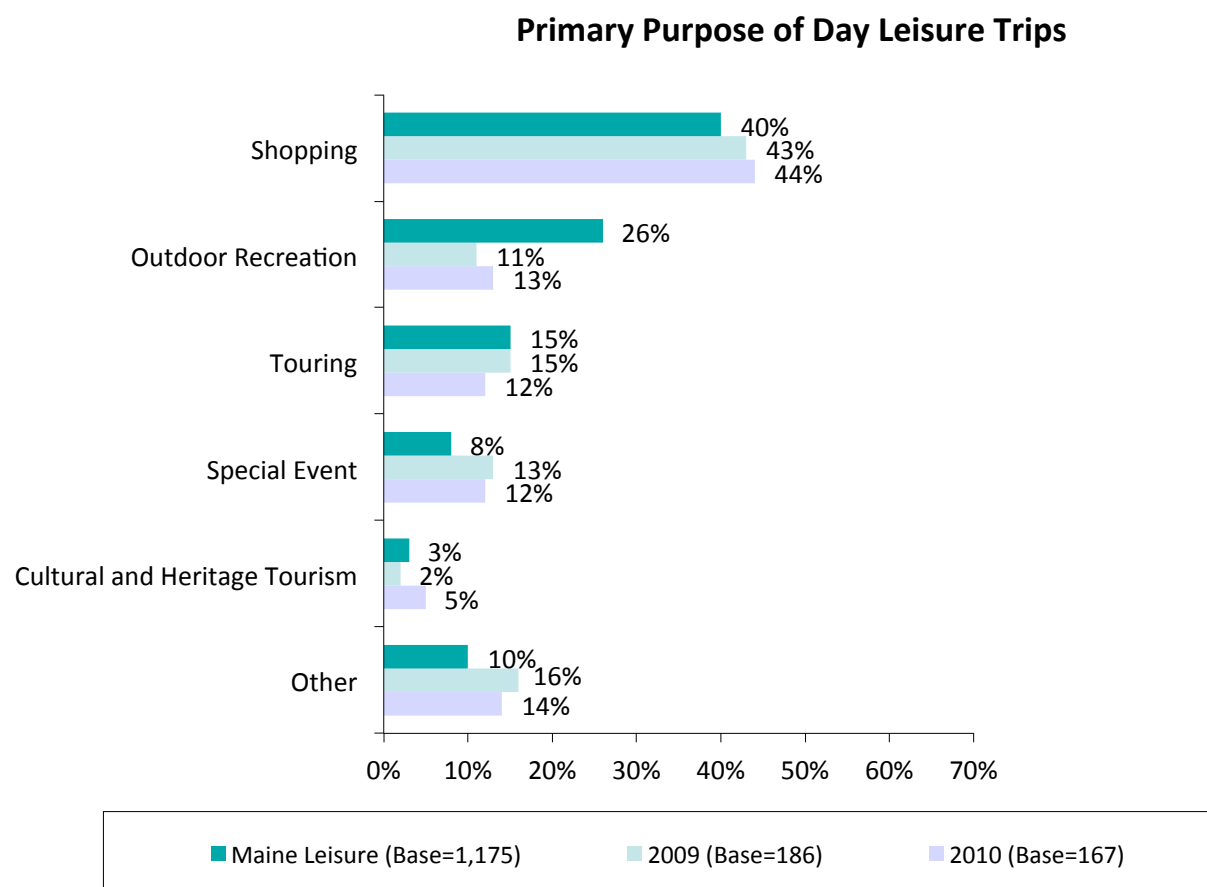
■ 2010 (Base=167)

Day Q1A. In what State or Province do you currently reside?

▲▼ notes significant year-over-year difference at 95% confidence level

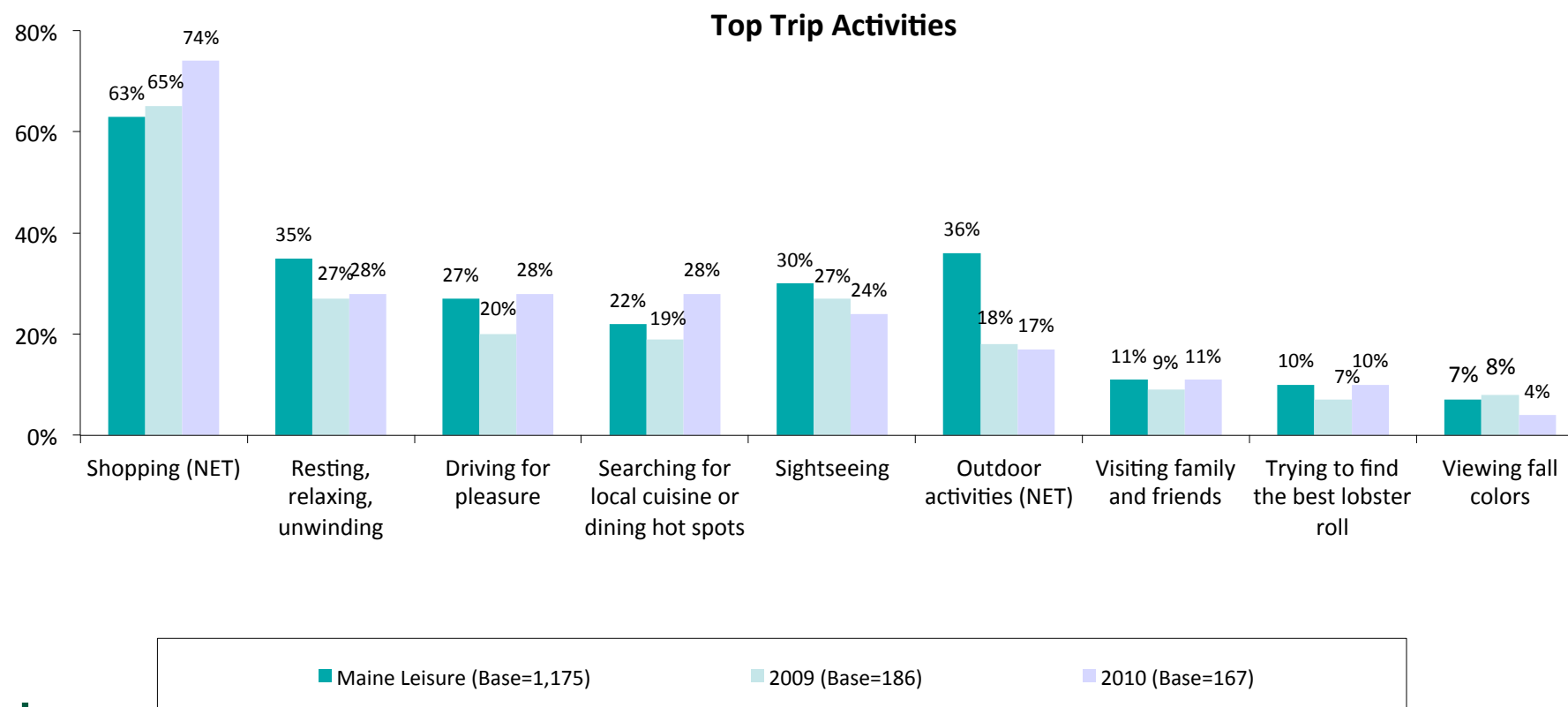
Primary Purpose of Day Leisure Trips: Greater Portland & Casco Bay

- Shopping remained the top primary trip purpose of leisure day trips to Greater Portland.



Day Leisure Trip Activities: Greater Portland & Casco Bay

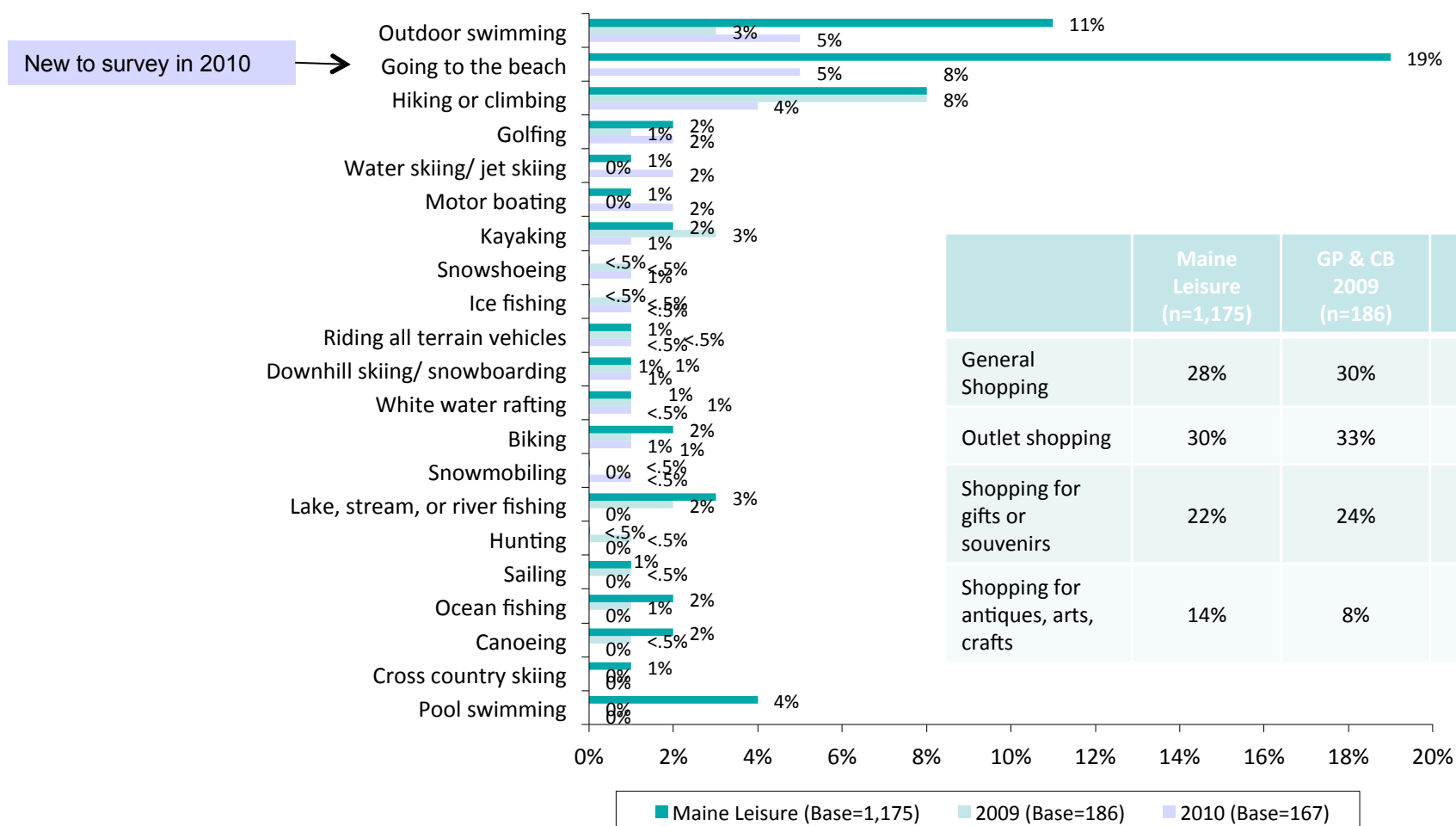
- Shopping was the most widely cited trip activity among leisure day visitors to Greater Portland in 2010. Secondly, visitors engaged in driving for pleasure, searching for local cuisine, and relaxing, as all three are enjoyed by over one-quarter of leisure day visitors to Greater Portland.



Day Leisure Trip Activities: *Greater Portland & Casco Bay*

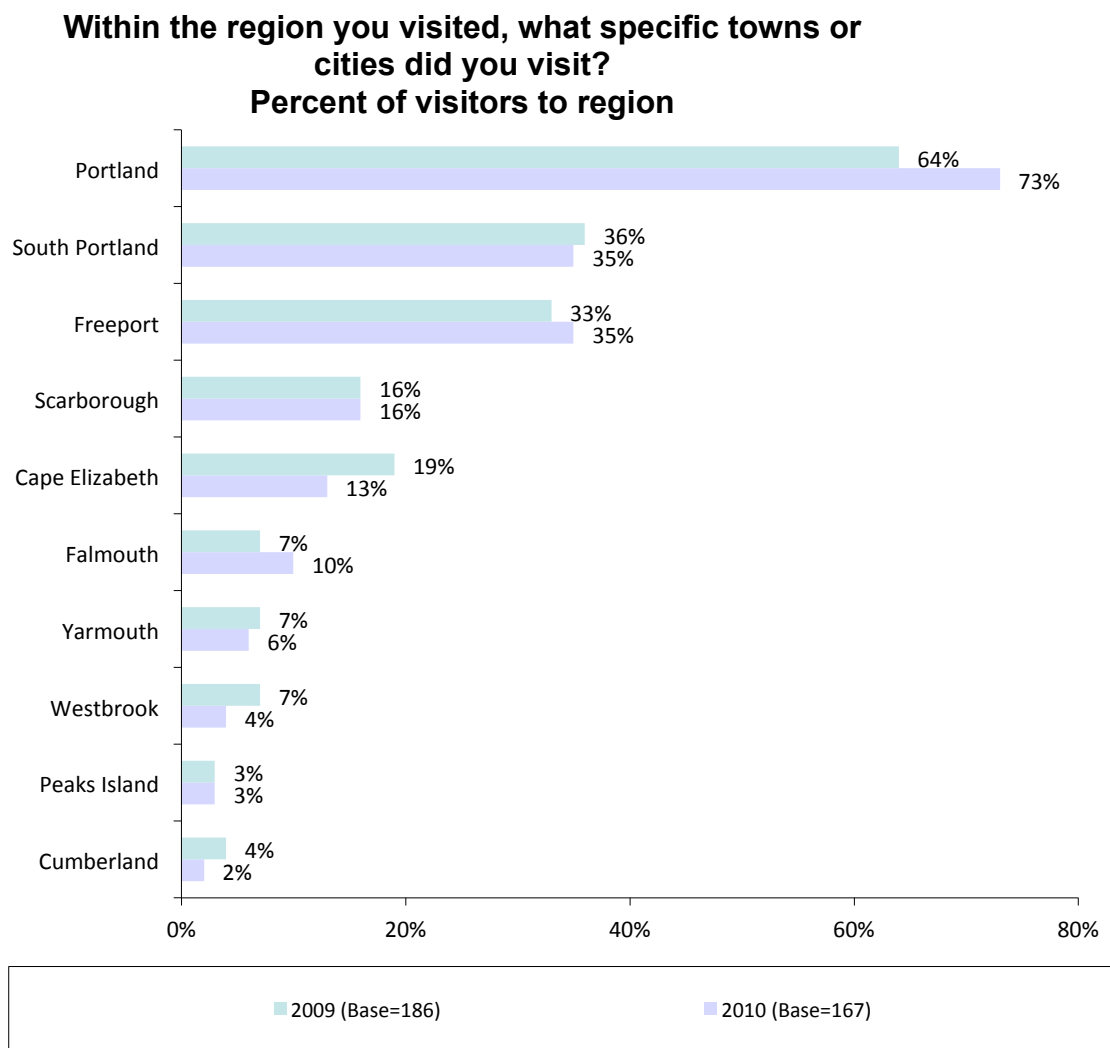
- Among leisure day visitors to Greater Portland & Casco Bay, outdoor swimming, going to the beach, and hiking or climbing were the most popular outdoor activities in 2010.

Outdoor Activities



	Maine Leisure (n=1,175)	GP & CB 2009 (n=186)	GP & CB 2010 (n=167)
General Shopping	28%	30%	35%
Outlet shopping	30%	33%	33%
Shopping for gifts or souvenirs	22%	24%	28%
Shopping for antiques, arts, crafts	14%	8%	18%

Day Leisure Visitor Towns & Cities Visited: 2010 Annual Report Greater Portland & Casco Bay



Regional Insights: Maine Lakes & Mountains



Overnight Leisure Visitor Demographics: *2010 Annual Report*

Lakes & Mountains

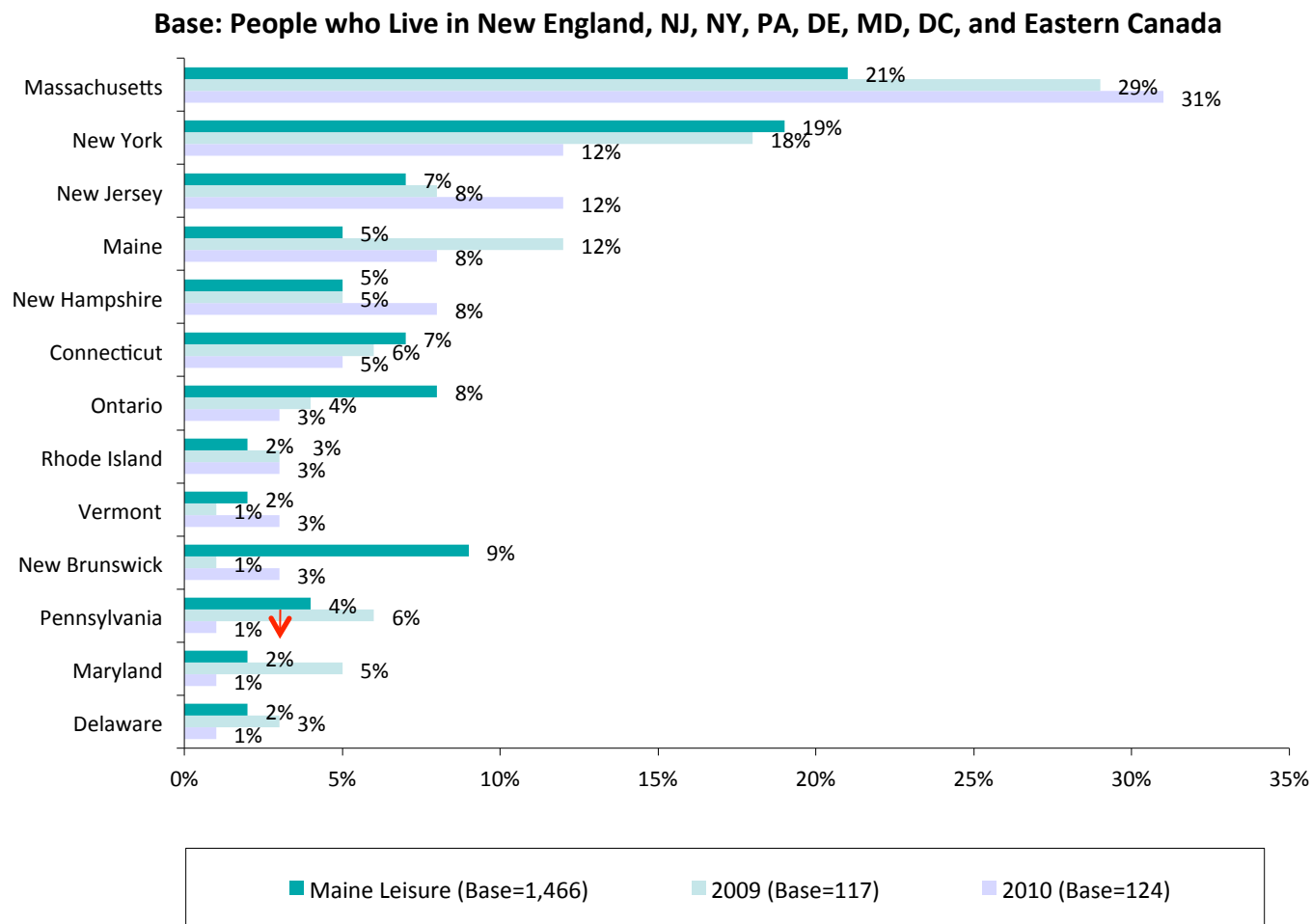
- The Lakes and Mountains region continues to attract visitors who are slightly younger than the state average.

	Maine Leisure (Base=1,466)	2009 (Base=117)	2010 (Base=124)
Mean Age	45.2	42.2	41.1
< 35	28%	36%	42%
35 - 44	19%	24%	21%
45 - 54	24%	13%	17%
55 +	30%	27%	20%
Mean Income	\$106,700	\$108,300	\$99,800
< \$50,000	11%	12%	16%
\$50,000 - \$99,000	37%	35%	35%
\$100,000 +	36%	37%	34%
Female	47%	44%	43%
College Degree or Higher	76%	77%	75%
Married	61%	58%	54%
Employed Full Time	60%	69%	70%

Overnight Leisure Visitor Residence: *Lakes & Mountains*

2010 Annual Report

- Nearly one-third of overnight leisure visitors to the Lakes & Mountains region were from Massachusetts in 2010. The only significant year-over-year shift was a decline in the percentage of these visitors who are from Pennsylvania.

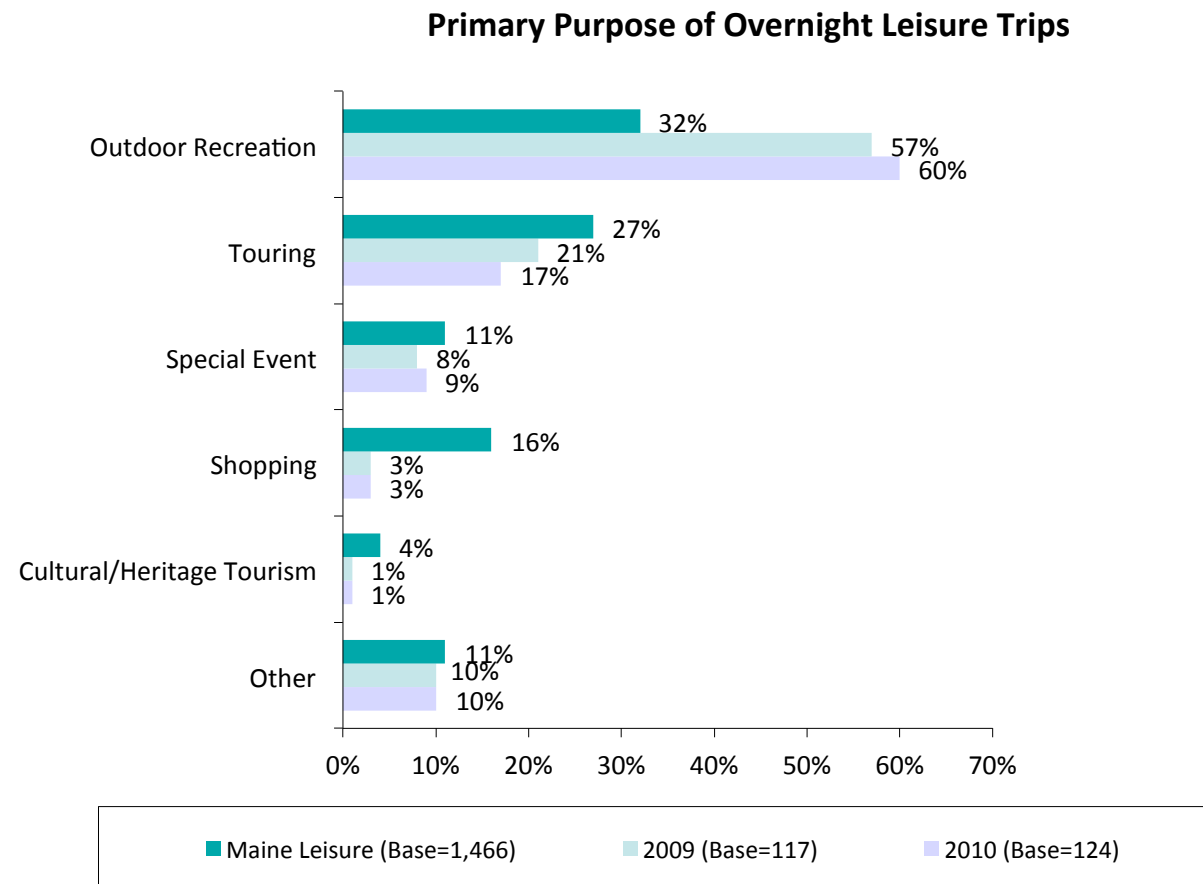


State/Province of residence.

↑↓ notes significant year-over-year difference at 95% confidence level

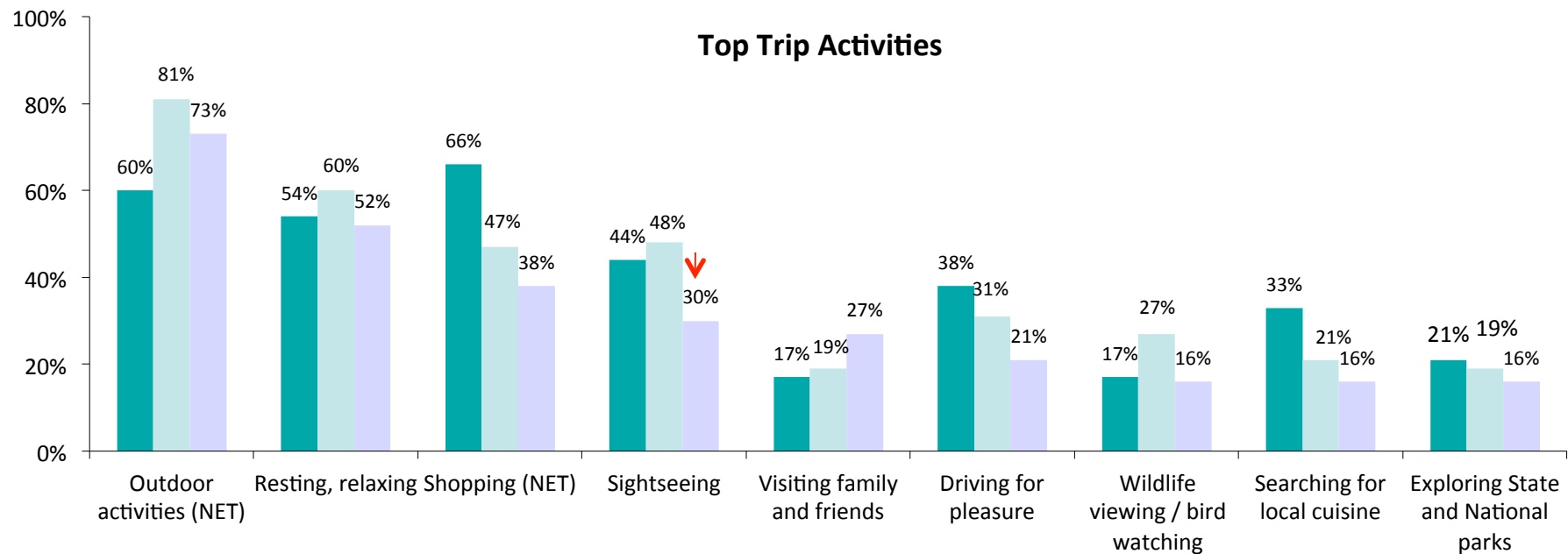
Primary Purpose of Overnight Leisure Trips: *2010 Annual Report* Lakes & Mountains

- Three out of five overnight leisure visitors to the Lakes & Mountains region reported that outdoor recreation was the primary purpose of their visit. This reflects the wide variety of outdoor activities available in this region for visitors throughout the year.



Overnight Leisure Trip Activities: *Lakes & Mountains*

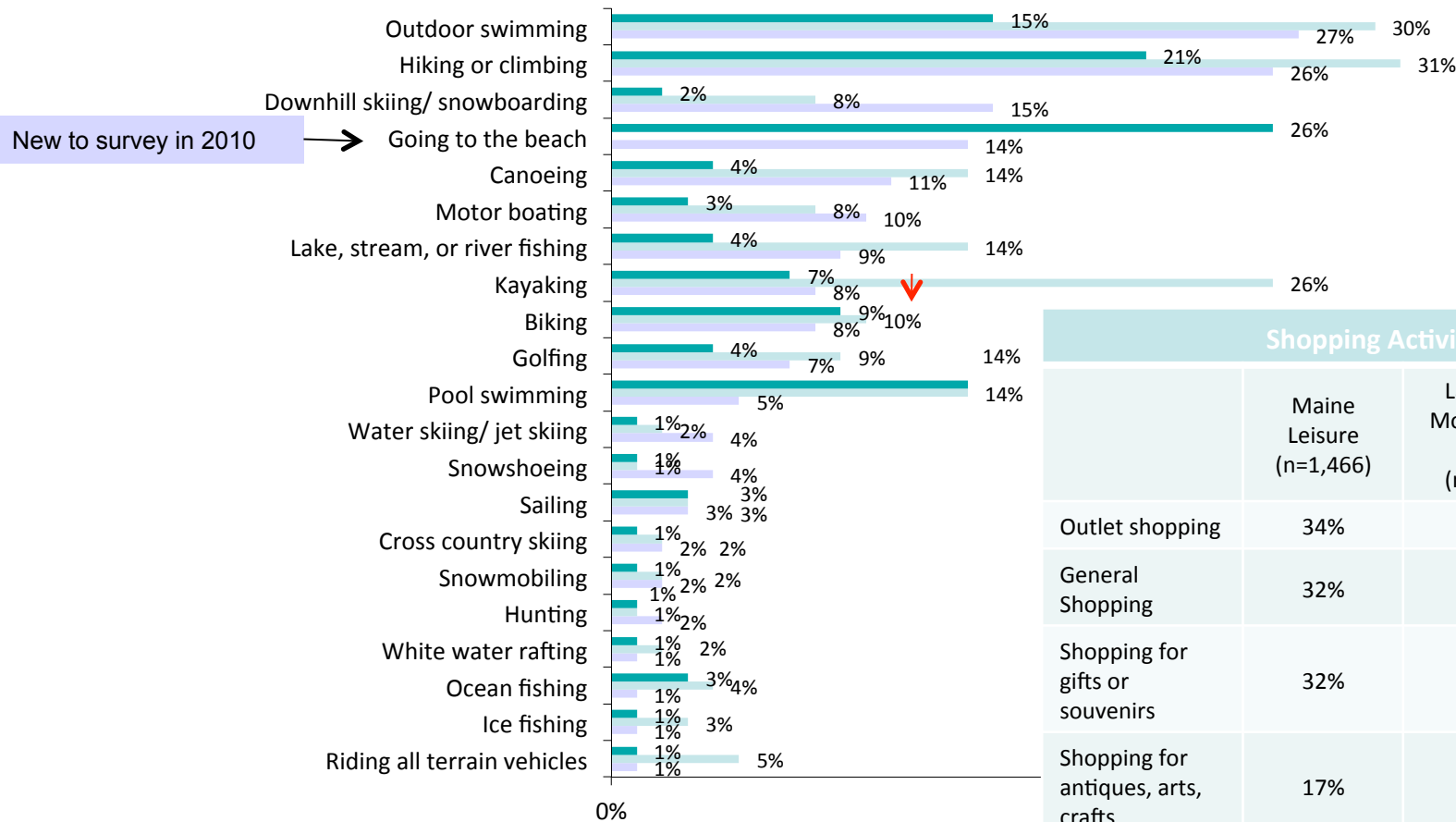
- Visitors to the Lakes and Mountains are likely to participate in outdoor recreation activities. Three out of four visitors to this region participated in at least one outdoor activity. Sightseeing saw a significant year-over-year decrease from 2009 to 2010.



Overnight Leisure Trip Activities: *Lakes & Mountains*

- While there is a decline in the proportion of visitors kayaking in 2010, visitors to the Lakes and Mountains did participate in wide variety of outdoor activities.

Outdoor Activities



Shopping Activities

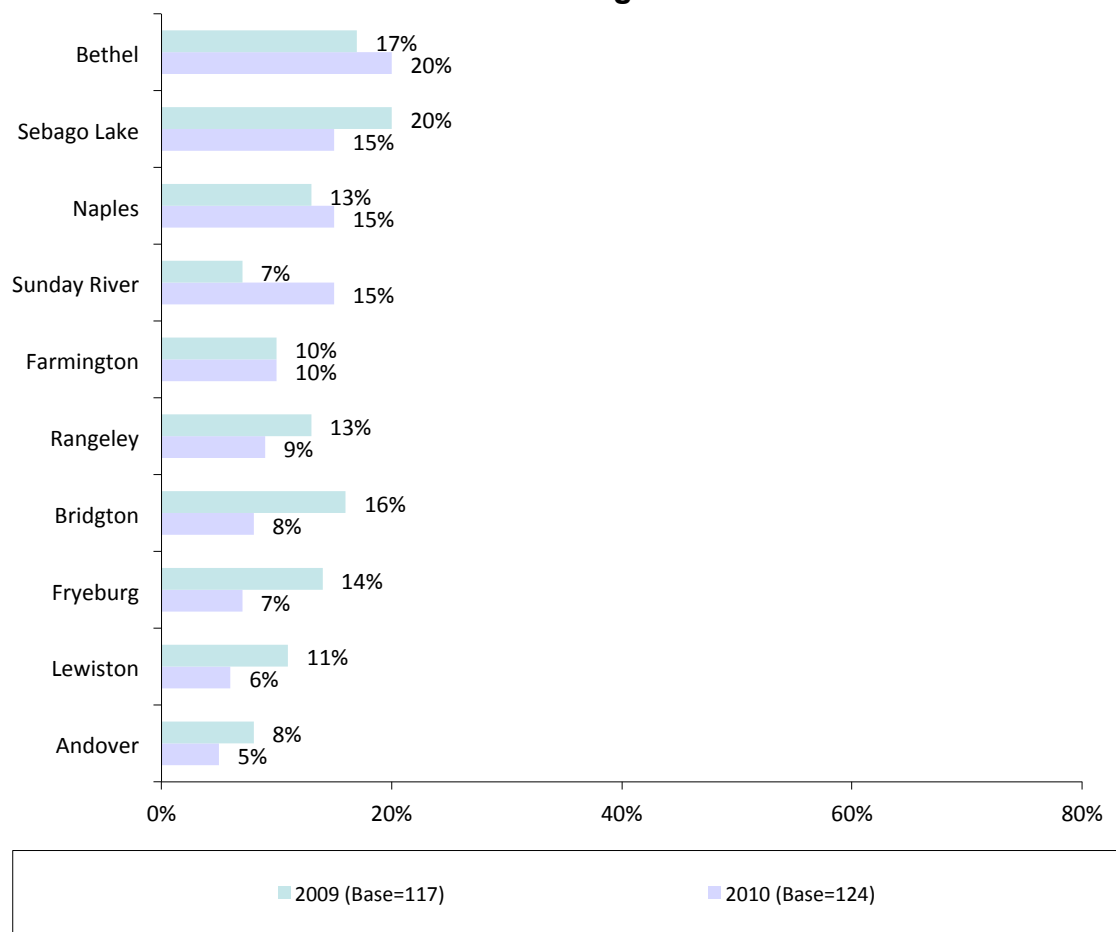
	Maine Leisure (n=1,466)	Lakes & Mountains 2009 (n=117)	Lakes & Mountains 2010 (n=124)
Outlet shopping	34%	16%	18%
General Shopping	32%	17%	17%
Shopping for gifts or souvenirs	32%	23%	11%
Shopping for antiques, arts, crafts	17%	11%	9%

Overnight Leisure Visitor Towns & Cities Visited: *Lakes & Mountains*

2010 Annual Report

Within the region you visited, what specific towns or cities did you visit?

Percent of visitors to region



Day Leisure Visitor Demographics: *Lakes & Mountains*

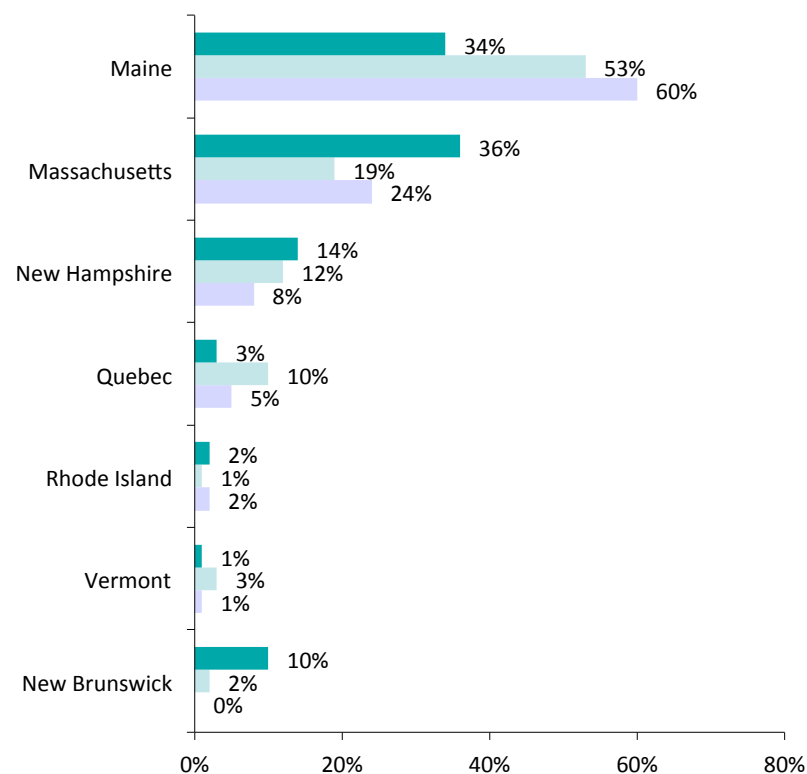
2010 Annual Report

- There was a significant year-over-year increase in the average household income of leisure day visitors to the Lakes & Mountains region.

	Maine Leisure (Base=1,175)	2009 (Base=82)	2010 (Base=76)
Mean Age	46.8	42.9	43.5
< 35	27%	38%	38%
35 - 44	17%	12%	13%
45 - 54	20%	24%	15%
55 +	36%	26%	34%
Mean Income	\$92,950	\$69,200	\$97,720 ↑
< \$50,000	21%	44%	21%
\$50,000 - \$99,000	43%	36%	45%
\$100,000 +	36%	20%	34%
Female	51%	59%	47%
College Degree or Higher	73%	72%	71%
Married	62%	43%	59%
Employed Full Time	58%	57%	62%

Day Leisure Visitor Residence: *Lakes & Mountains*

- More than half of leisure day visitors to the Lakes & Mountains region were from Maine, a result consistent with 2009 levels. Aside from the relatively large percentage of Maine residents, the Lakes & Mountains region also attracts leisure day visitors from Massachusetts, New Hampshire, and Quebec.



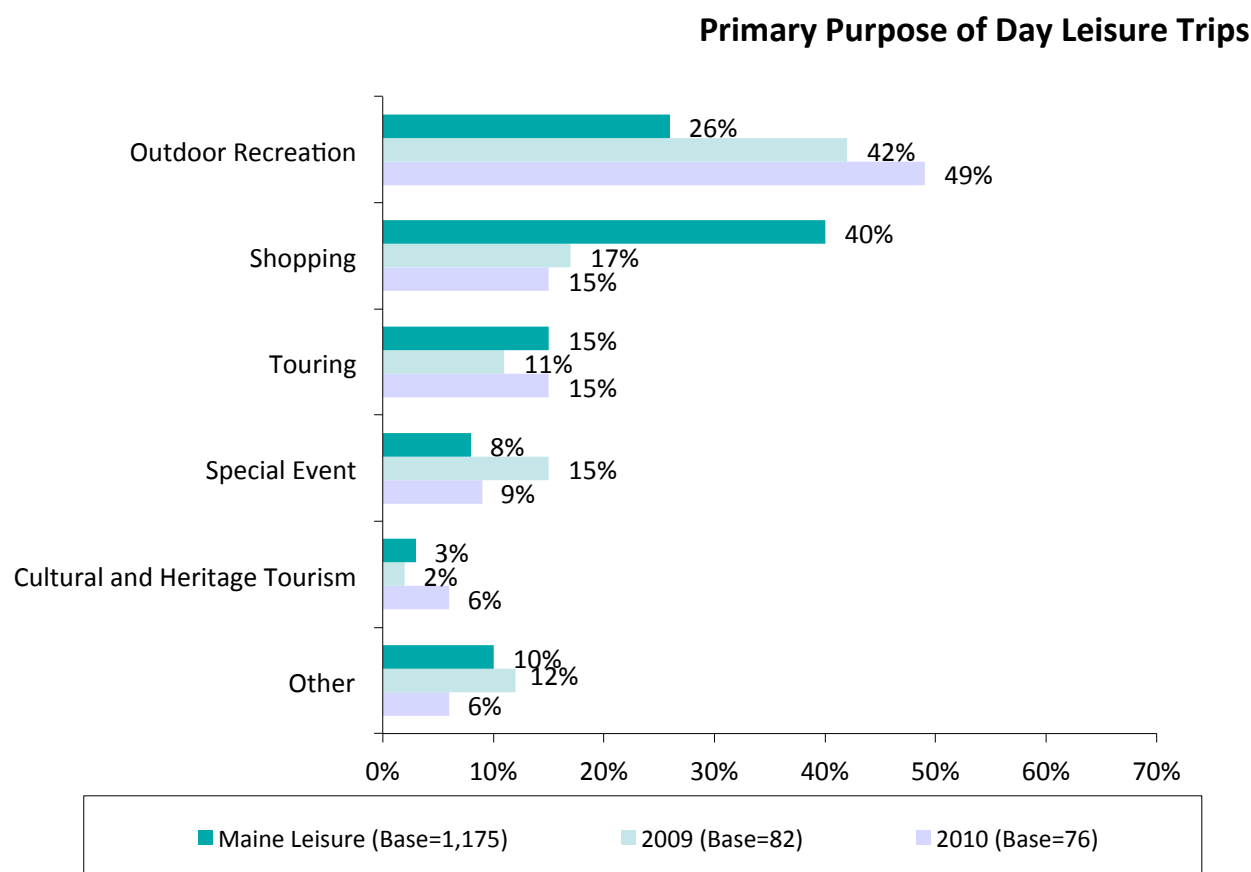
■ Maine Leisure (Base=1,175)

■ 2009 (Base=82)

■ 2010 (Base=76)

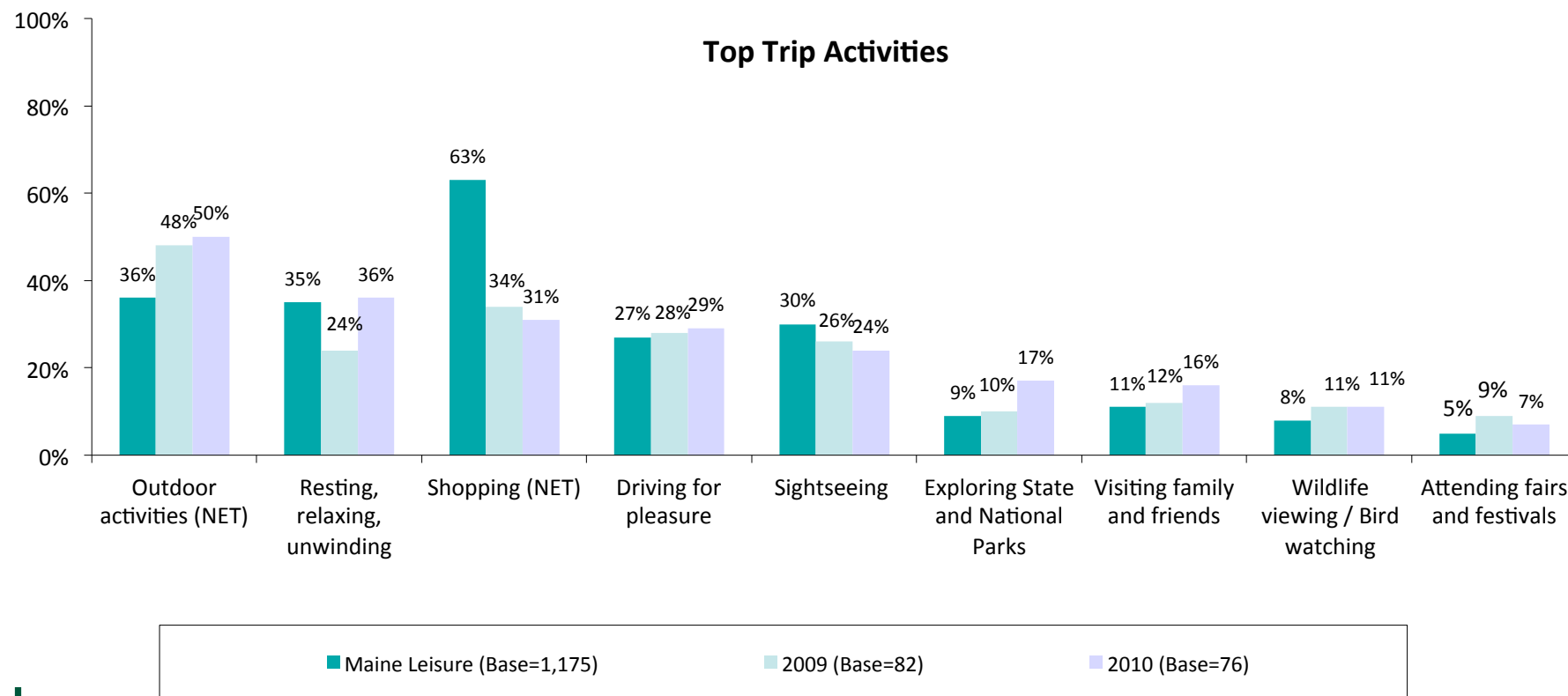
Primary Purpose of Day Leisure Trips: *Lakes & Mountains*

- As was the case with overnight leisure visitation to the Lakes & Mountains, outdoor recreation was a key primary trip purpose for this region. Shopping is not as popular in the Lakes and Mountains as is seen in other parts of the state.



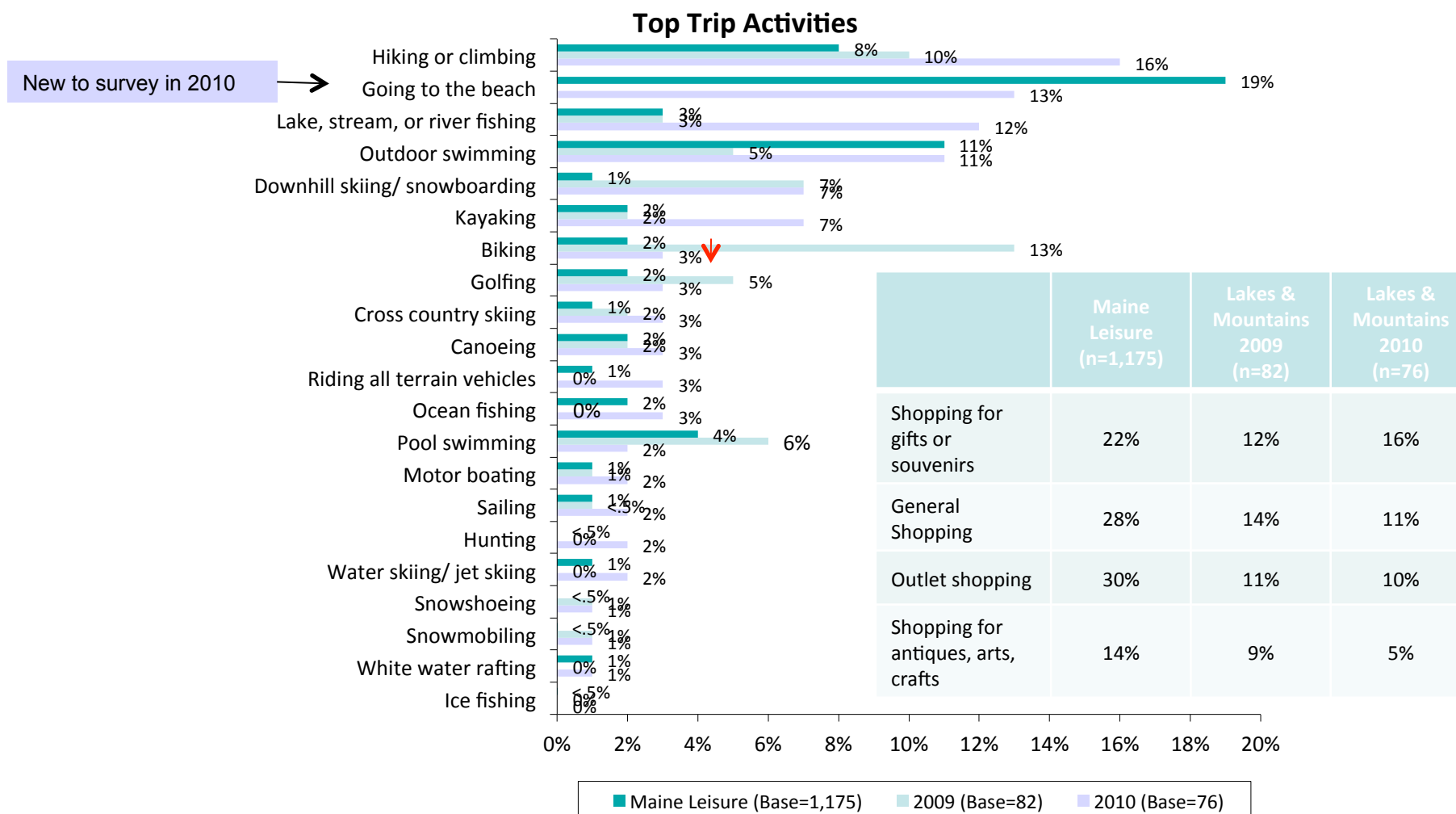
Day Leisure Trip Activities: *Lakes & Mountains*

- Outdoor recreation activities were the most widely cited activity conducted by leisure day visitors to the Lakes & Mountains.

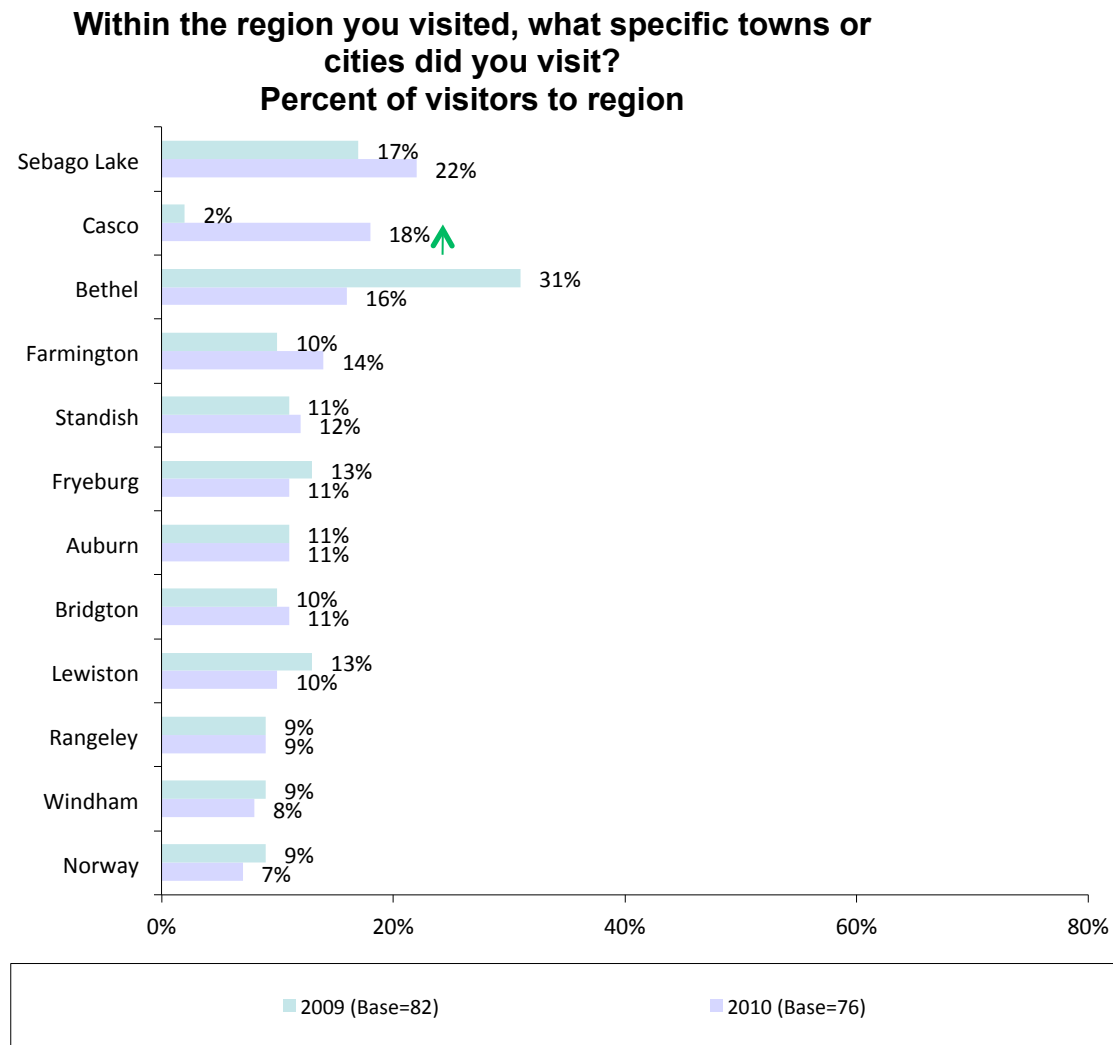


Day Leisure Trip Activities: *Lakes & Mountains*

- Visitors to the Lakes and Mountains region enjoy a variety of outdoor activities.



Day Leisure Visitor Towns & Cities Visited: 2010 Annual Report *Lakes & Mountains*



Regional Insights: Mid-Coast



Overnight Leisure Visitor Demographics: *2010 Annual Report*

Mid-Coast

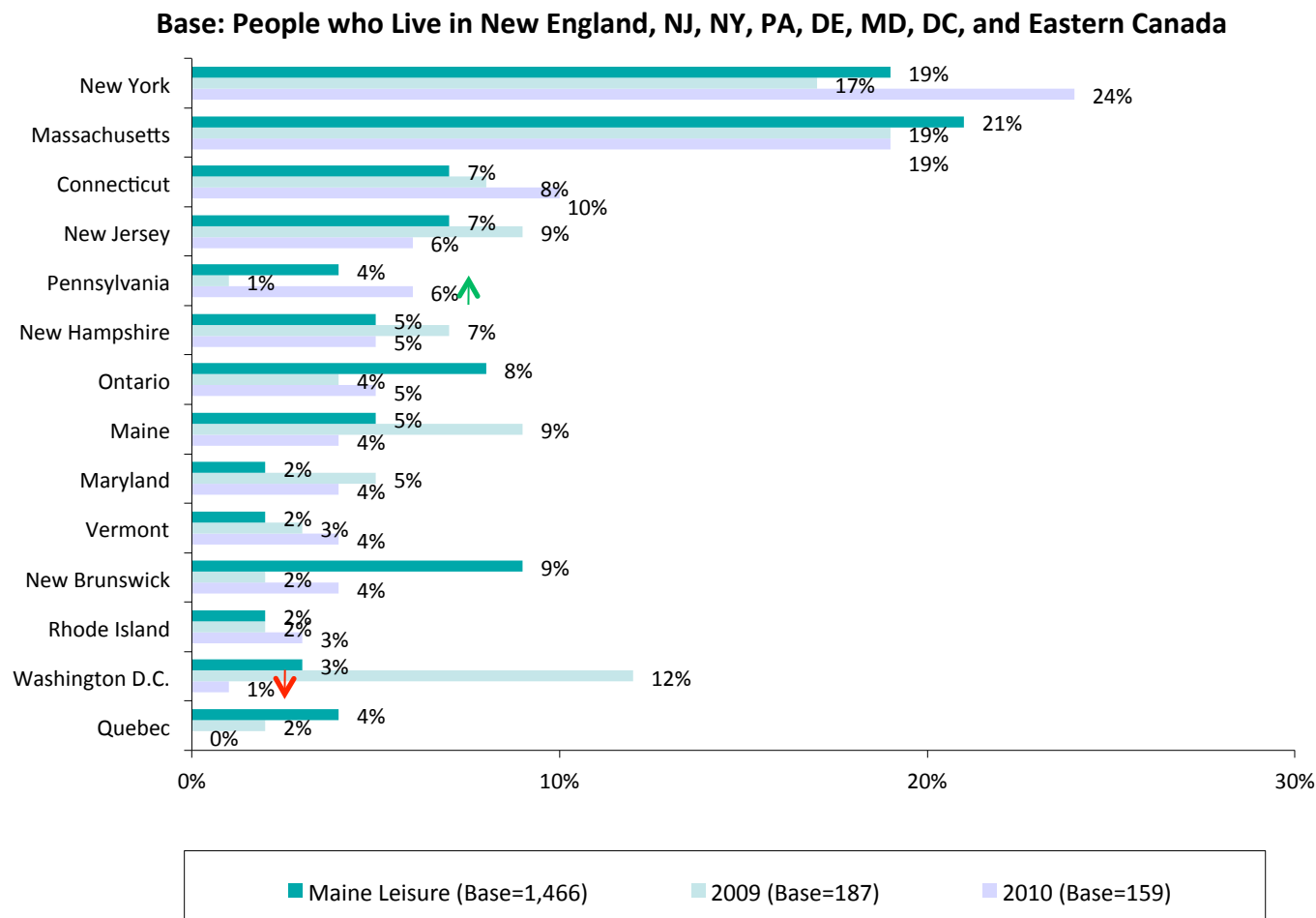
- The profile of overnight leisure visitors to the Mid-Coast has changed little from 2009 to 2010. The one exception is that 35-44 year old visitation saw a statistically significant year-over-year decrease from 2009 to 2010.

	Maine Leisure (Base=1,466)	2009 (Base=187)	2010 (Base=159)
Mean Age	45.2	45.4	45.0
< 35	28%	26%	33%
35 - 44	19%	24%	11% ▼
45 - 54	24%	17%	20%
55 +	30%	33%	36%
Mean Income	\$106,700	\$113,000	\$100,500
< \$50,000	11%	15%	15%
\$50,000 - \$99,000	37%	28%	38%
\$100,000 +	36%	41%	29%
Female	47%	39%	44%
College Degree or Higher	76%	80%	76%
Married	61%	65%	53%
Employed Full Time	60%	68%	58%

Overnight Leisure Visitor Residence: *Mid-Coast*

2010 Annual Report

- Consistent with 2009, the largest percentage of overnight leisure visitors to the Mid-Coast are from New York or Massachusetts, each with just under one-quarter of these visitors. These states are followed by Connecticut, New Jersey, and Pennsylvania. Washington D.C. saw a significant decrease from 2009 to 2010.

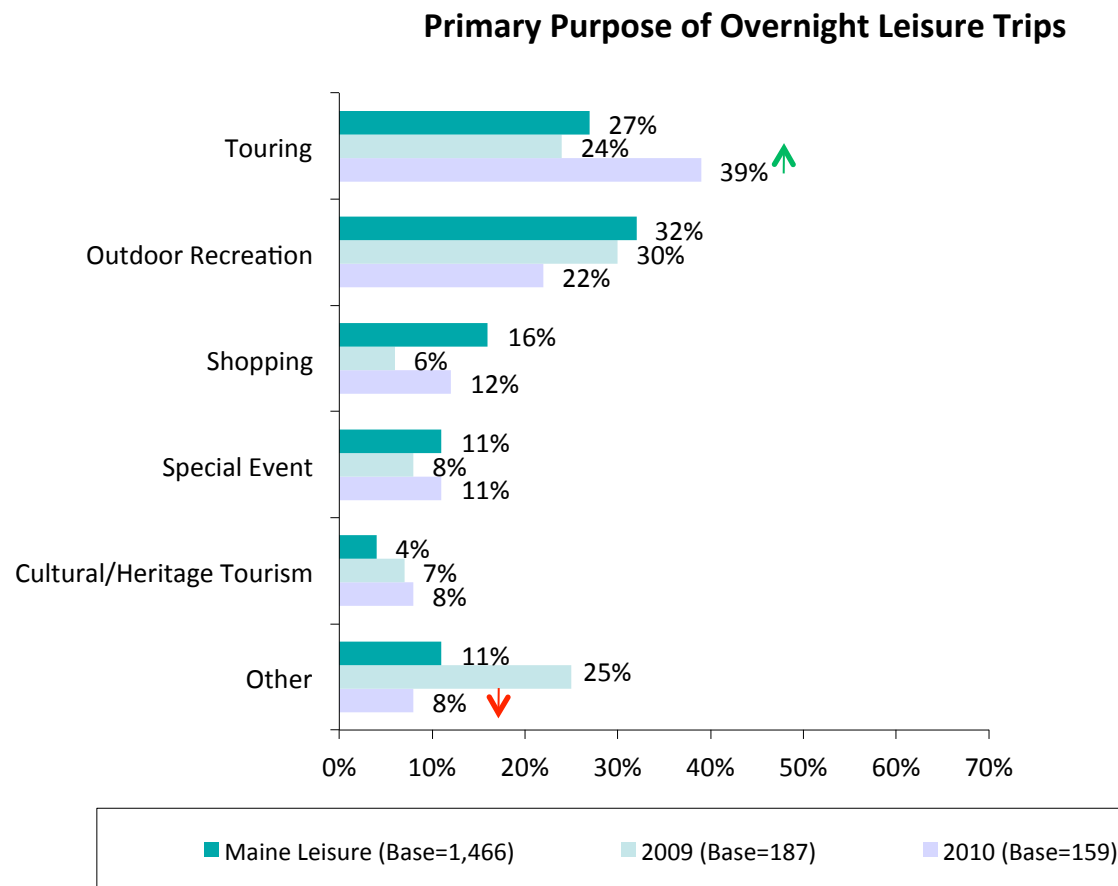


State/Province of residence.

↑ ↓ notes significant year-over-year difference at 95% confidence level

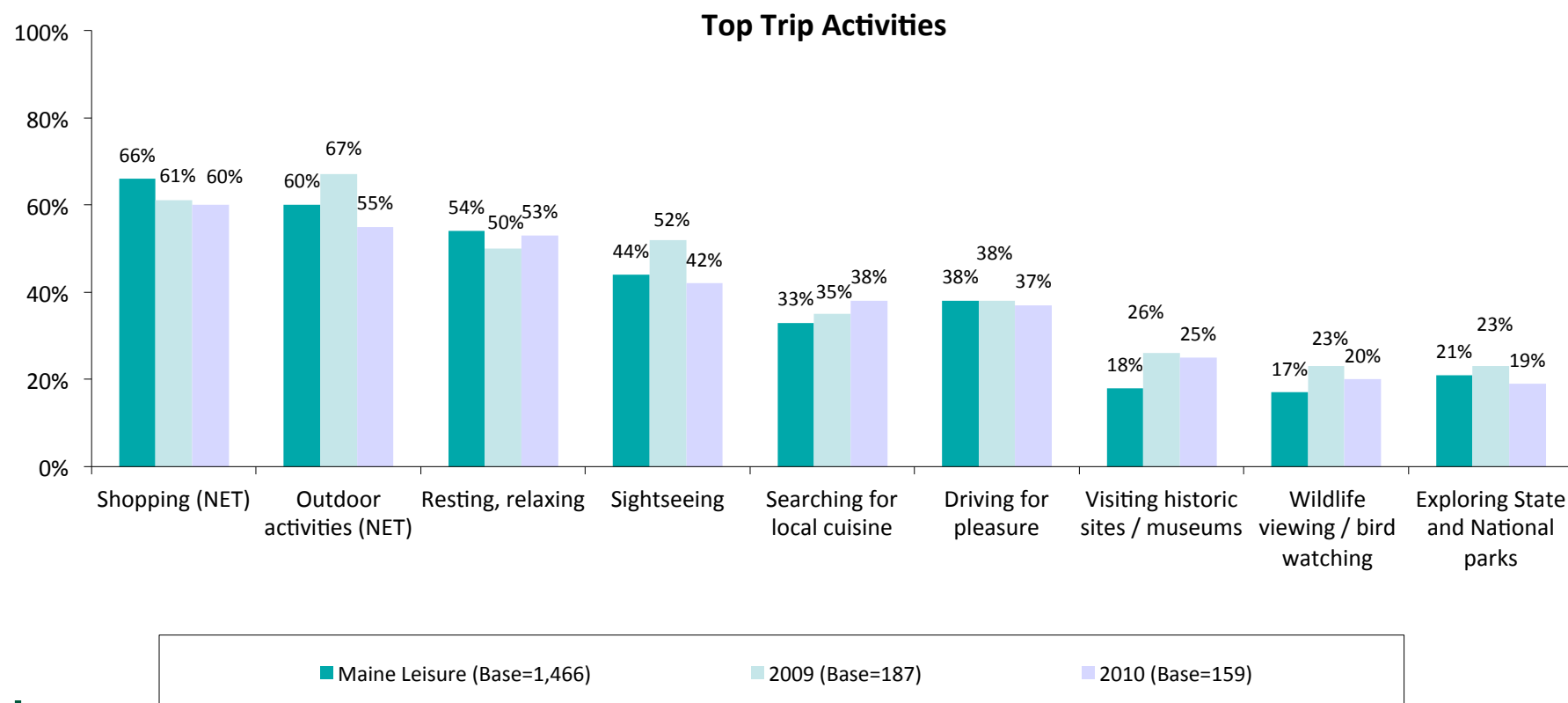
Primary Purpose of Overnight Leisure Trips: *2010 Annual Report* Mid-Coast

- 2010 saw an increase in those citing touring as a driving factor for visitation to the Mid-Coast. It's also worth noting the significant decrease in those selecting other.



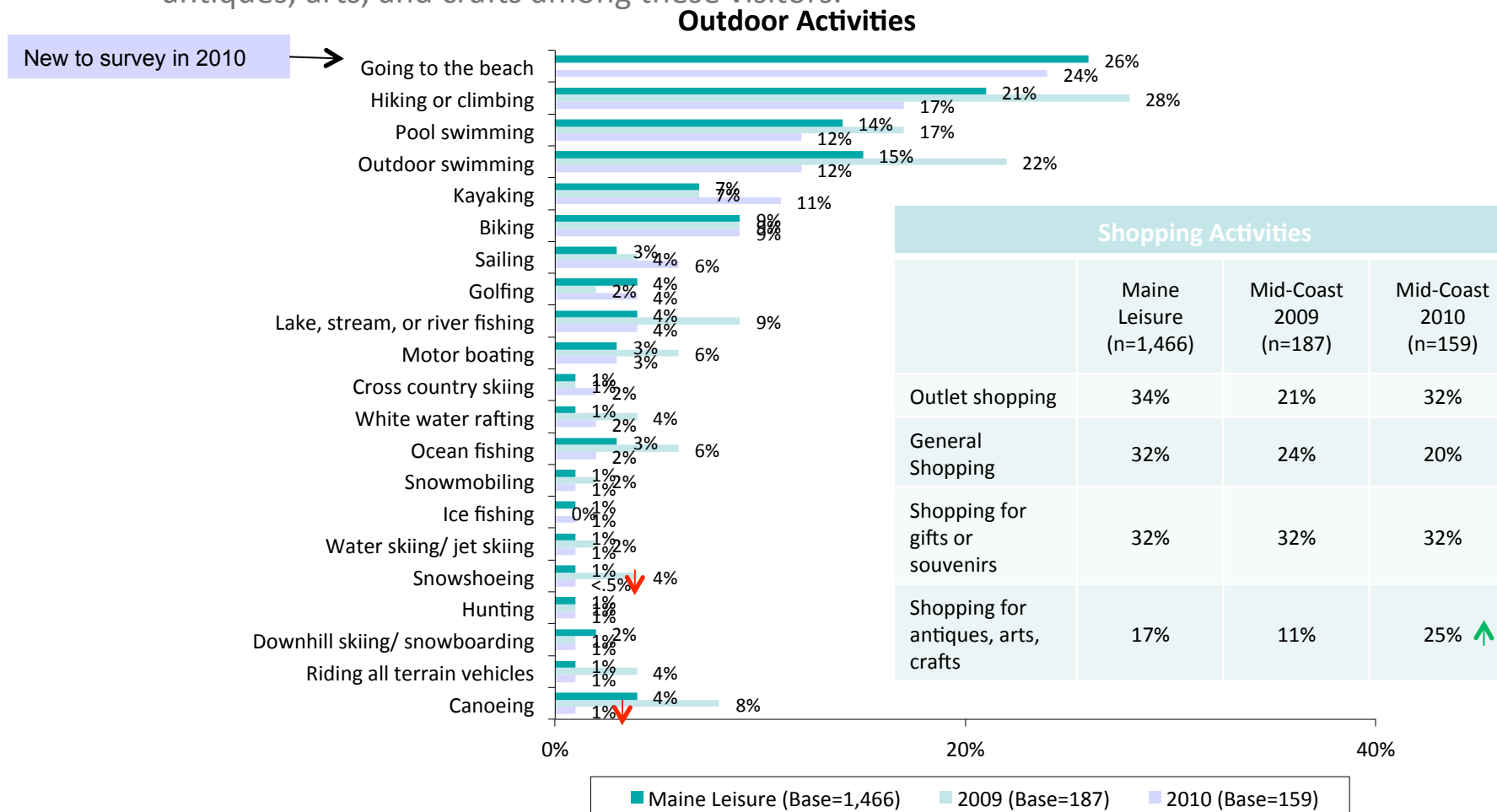
Overnight Leisure Trip Activities: *Mid-Coast*

- Despite being only the third most popular primary trip purpose, shopping was a popular activity in the Mid-Coast during 2010, as visitors to the region found time to shop often in addition to other activities.



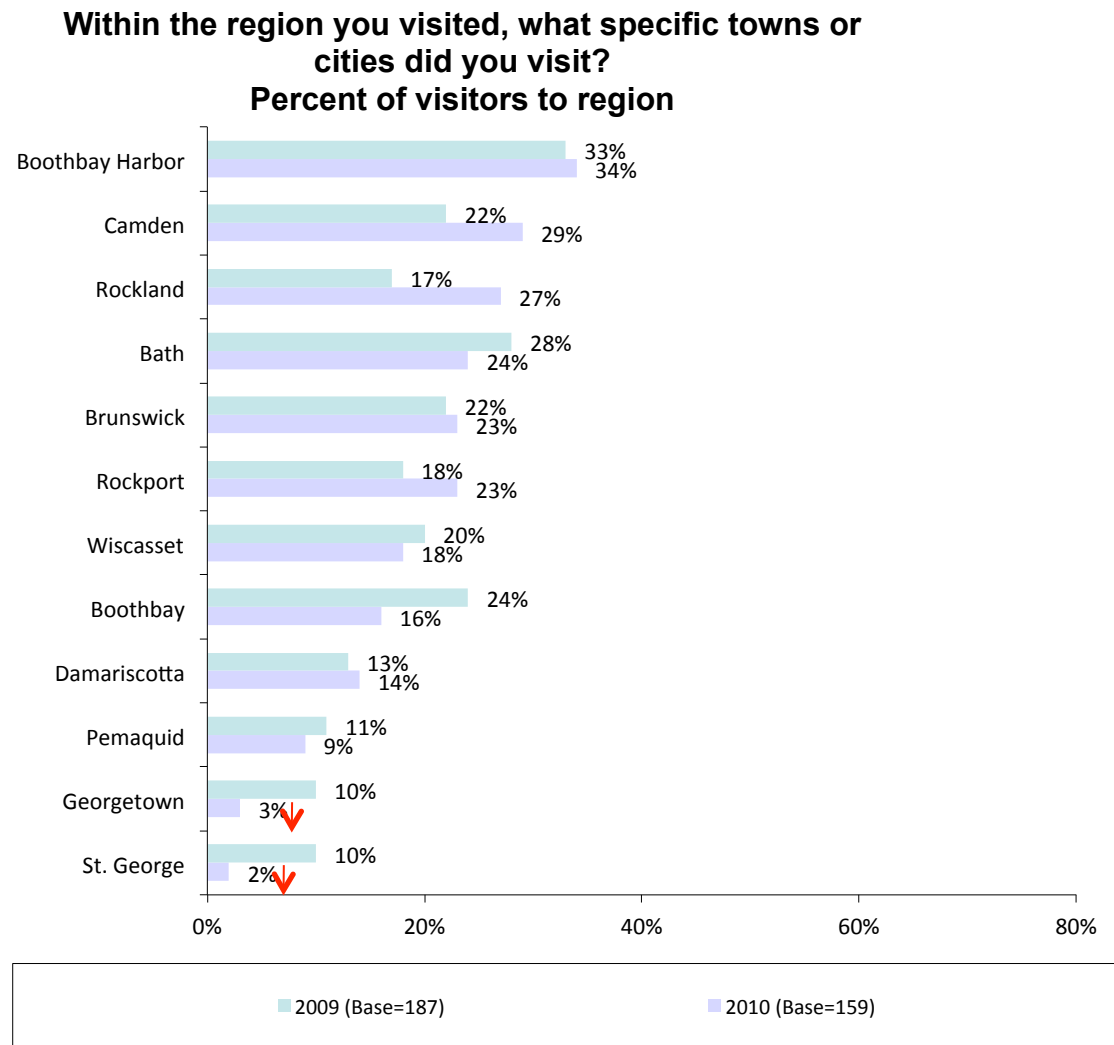
Overnight Leisure Trip Activities: *Mid-Coast*

- Among leisure visitors to the Mid-Coast region, going to the beach, hiking or climbing, and swimming are popular outdoor activities. 2010 also saw an increase shopping for antiques, arts, and crafts among these visitors.



Overnight Leisure Visitor Towns & Cities Visited: *Mid-Coast*

2010 Annual Report



Day Leisure Visitor Demographics: *Mid-Coast*

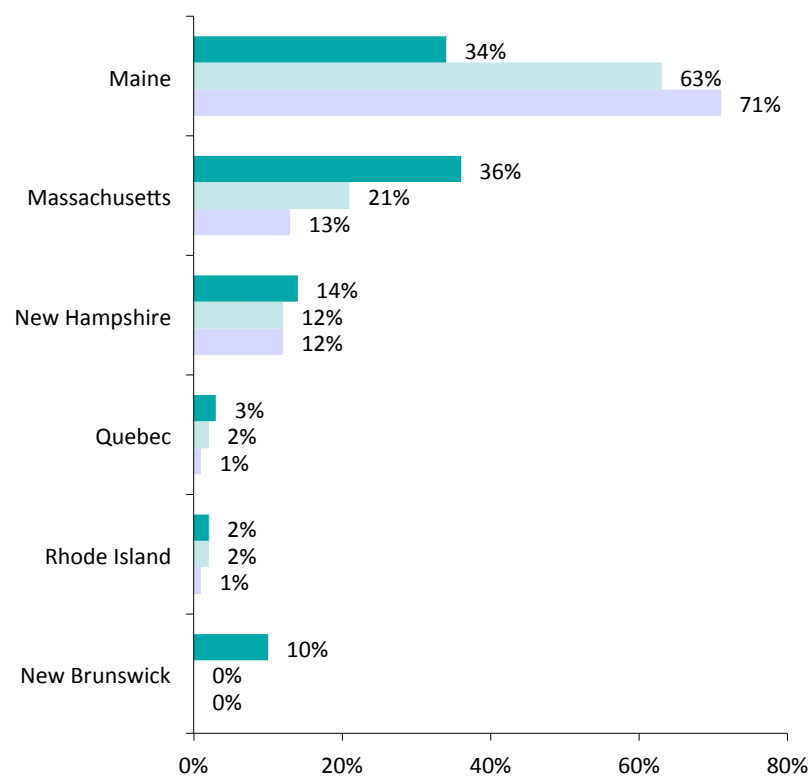
2010 Annual Report

- The demographic profile of day leisure visitors to the Mid-Coast remained stable between 2009 and 2010.

	Maine Leisure (Base=1,175)	2009 (Base=155)	2010 (Base=105)
Mean Age	46.8	50.2	49.6
< 35	27%	21%	20%
35 - 44	17%	13%	18%
45 - 54	20%	15%	19%
55 +	36%	51%	44%
Mean Income	\$92,950	\$76,000	\$82,450
< \$50,000	21%	27%	26%
\$50,000 - \$99,000	43%	55%	47%
\$100,000 +	36%	18%	27%
Female	51%	47%	50%
College Degree or Higher	73%	65%	72%
Married	62%	66%	69%
Employed Full Time	58%	52%	49%

Day Leisure Visitor Residence: *Mid-Coast*

- Well over two-thirds of leisure day visitors to the Mid-Coast are Maine residents. There were no significant year-over-year changes in the residence of leisure day visitors to the Mid-Coast.



■ Maine Leisure (Base=1,175) ■ 2009 (Base=155) ■ 2010 (Base=105)

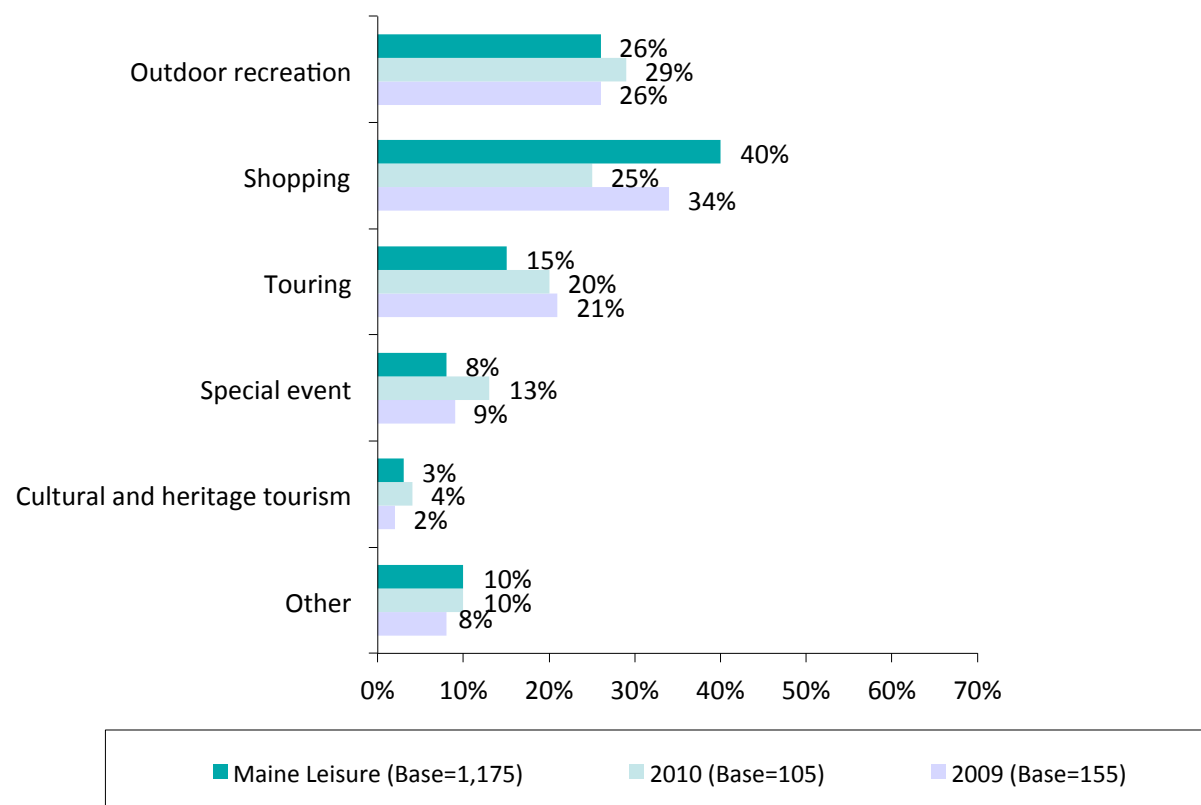
Day Q1A. In what State or Province do you reside?

↑↓ notes significant year-over-year difference at 95% confidence level

Primary Purpose of Day Leisure Trips: Mid-Coast

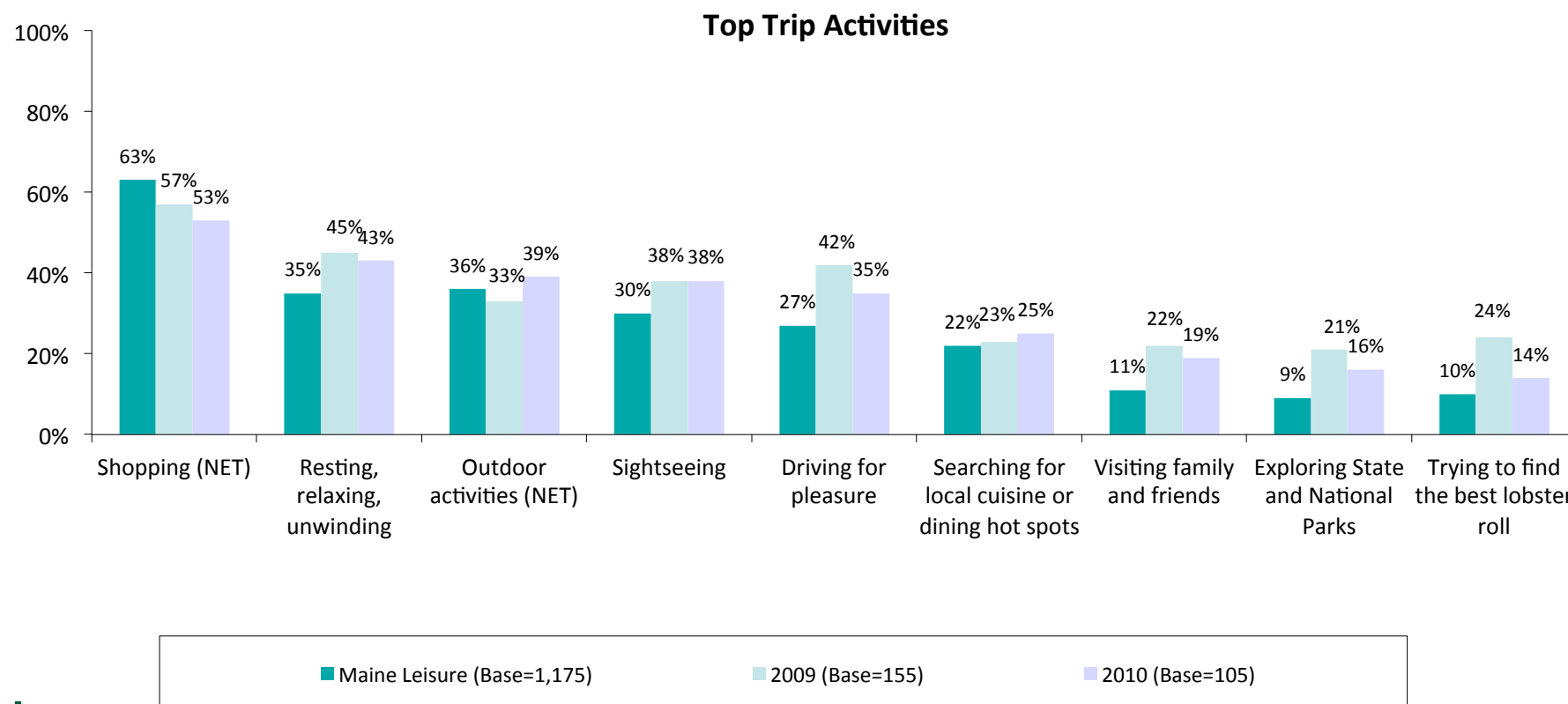
- Day leisure visitors to the Mid-Coast come for a variety of primary trip purposes. Just over one-quarter of this group report that their leisure day visit to the region was for outdoor recreation while another one-quarter report that it was to shop. This illustrates the wide variety of attractions in the Mid-Coast for leisure day visitors.

Primary Purpose of Day Leisure Trips



Day Leisure Trip Activities: *Mid-Coast*

- Just over half of Mid-Coast day visitors reported that they went shopping, while resting/relaxing and outdoor activities were all cited by slightly less than half of these visitors.

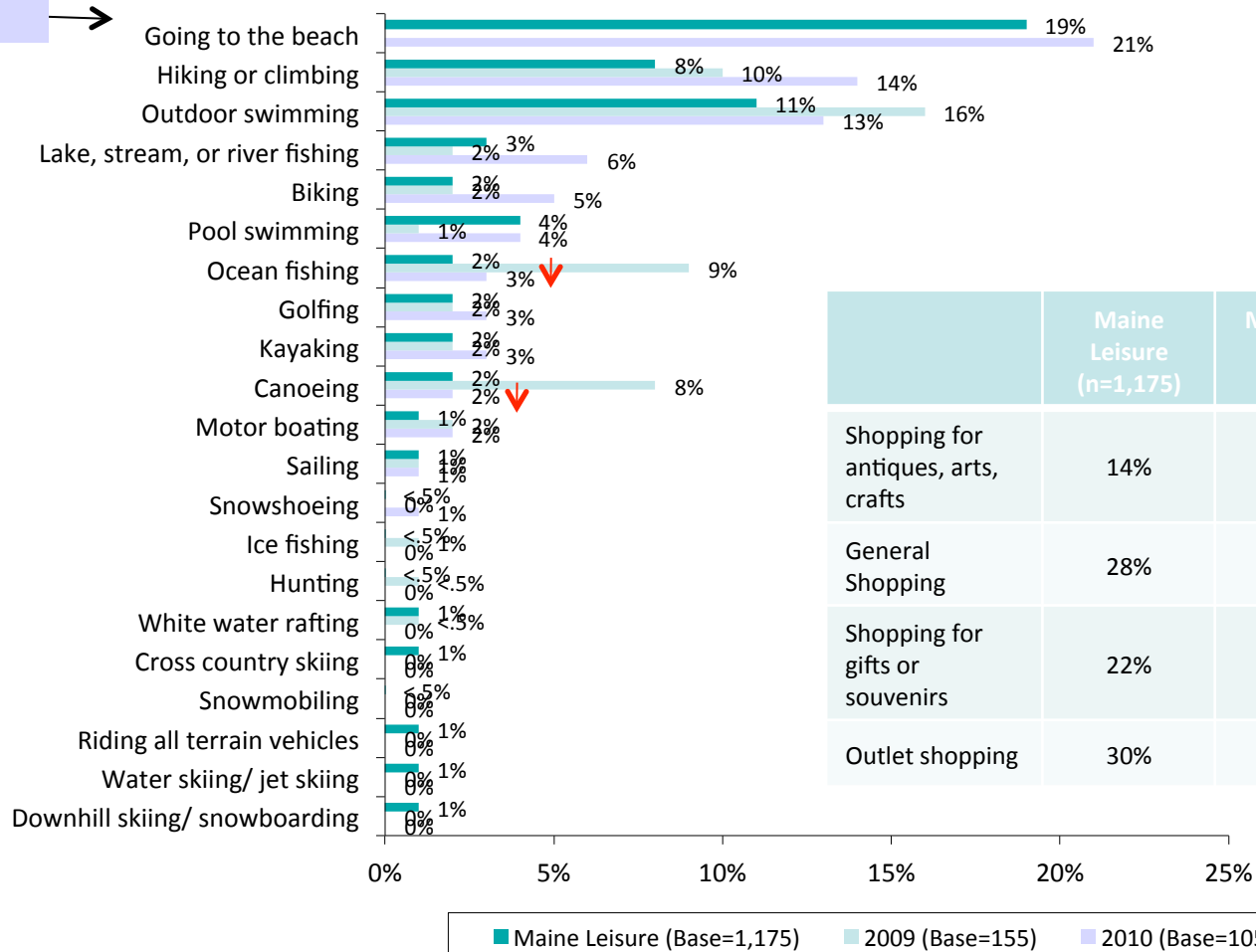


Day Leisure Trip Activities: *Mid-Coast*

- Day visitors to the Mid-Coast were more likely to report shopping for antiques, arts, and crafts than in 2009. The proportion of visitors involved in ocean fishing and canoeing are both down from 2009.

Outdoor Activities

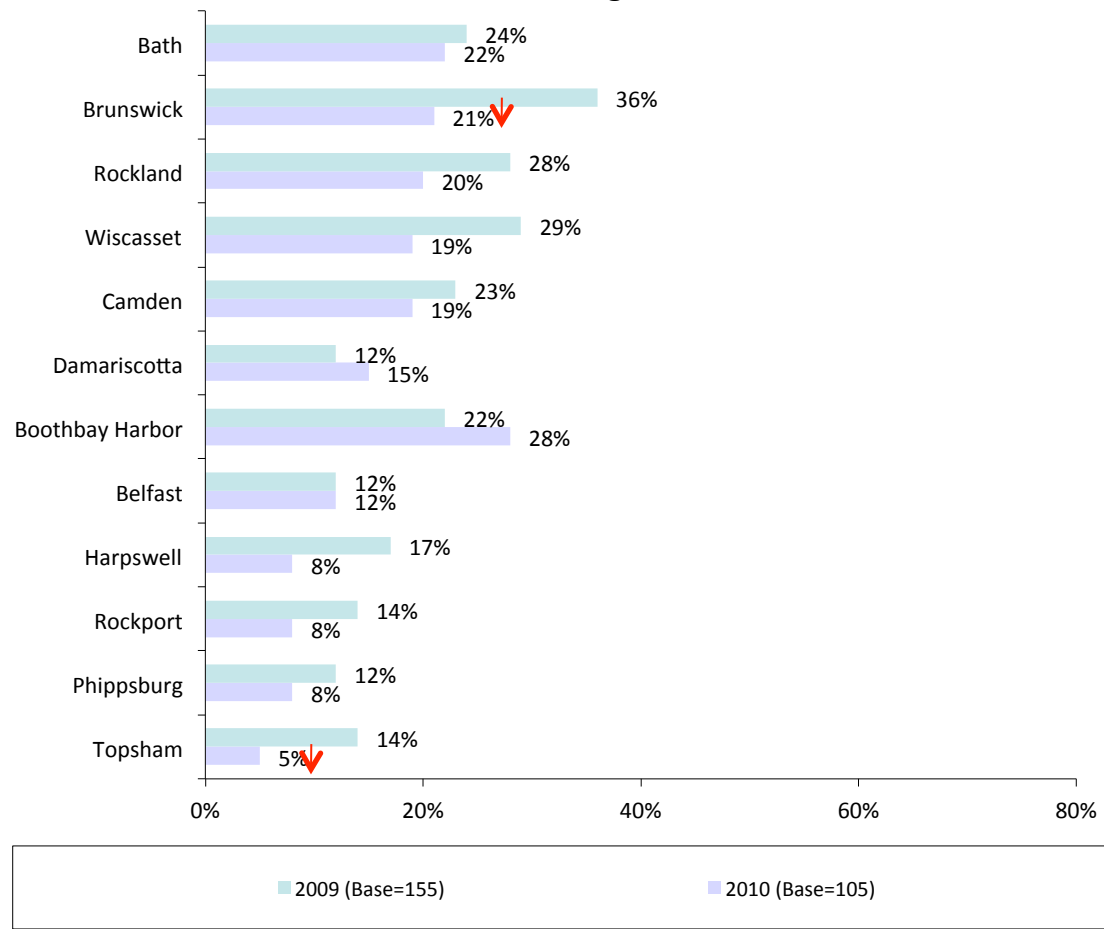
New to survey in 2010 →



	Maine Leisure (n=1,175)	Mid-Coast 2009 (n=155)	Mid-Coast 2010 (n=105)
Shopping for antiques, arts, crafts	14%	11%	25% ↑
General Shopping	28%	22%	21%
Shopping for gifts or souvenirs	22%	29%	18%
Outlet shopping	30%	14%	14%

Day Leisure Visitor Towns & Cities Visited: 2010 Annual Report Mid-Coast

Within the region you visited, what specific towns or cities did you visit?
Percent of visitors to region



Regional Insights: Kennebec & Moose River Valley



Overnight Leisure Visitor Demographics: *2010 Annual Report*

Kennebec & Moose River Valley

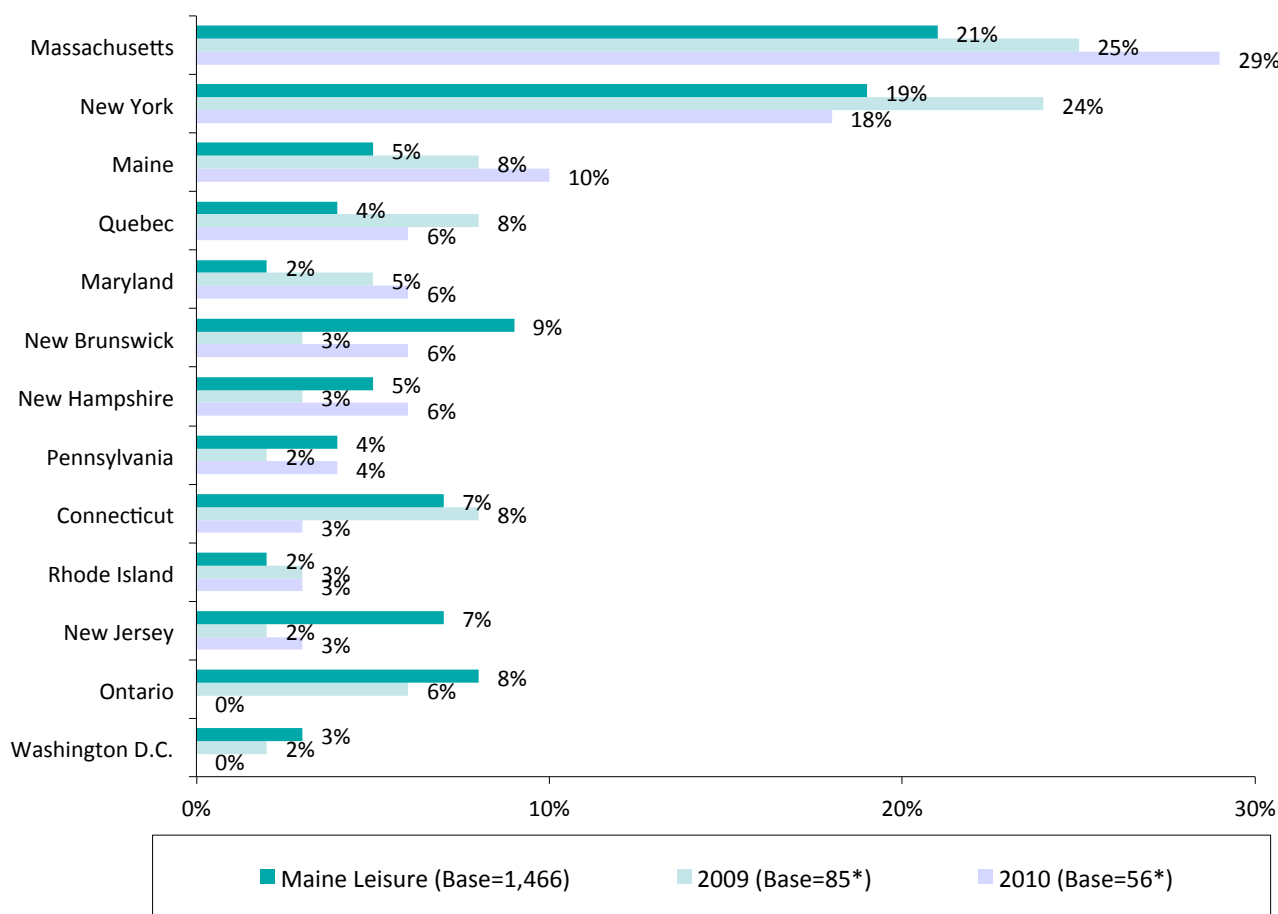
- Kennebec & Moose River Valley overnight leisure visitors in 2010 are very similar to overnight visitors from 2009.

	Maine Leisure (Base=1,466)	2009 (Base=85*)	2010 (Base=56*)
Mean Age	45.2	42.3	43.7
< 35	28%	39%	32%
35 - 44	19%	15%	23%
45 - 54	24%	12%	15%
55 +	30%	34%	30%
Mean Income	\$106,700	\$113,400	\$101,400
< \$50,000	11%	9%	18%
\$50,000 - \$99,000	37%	21%	38%
\$100,000 +	36%	49%	25%
Female	47%	42%	37%
College Degree or Higher	76%	75%	75%
Married	61%	64%	61%
Employed Full Time	60%	49%	40%

Overnight Leisure Visitor Residence: Kennebec & Moose River Valley

- There were no statistically significant year-over-year shifts in the residential profile of overnight leisure visitors to the Kennebec & Moose River Valley region of Maine. Massachusetts and New York provide the highest proportion of overnight visitors to this region.

Base: People who Live in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada



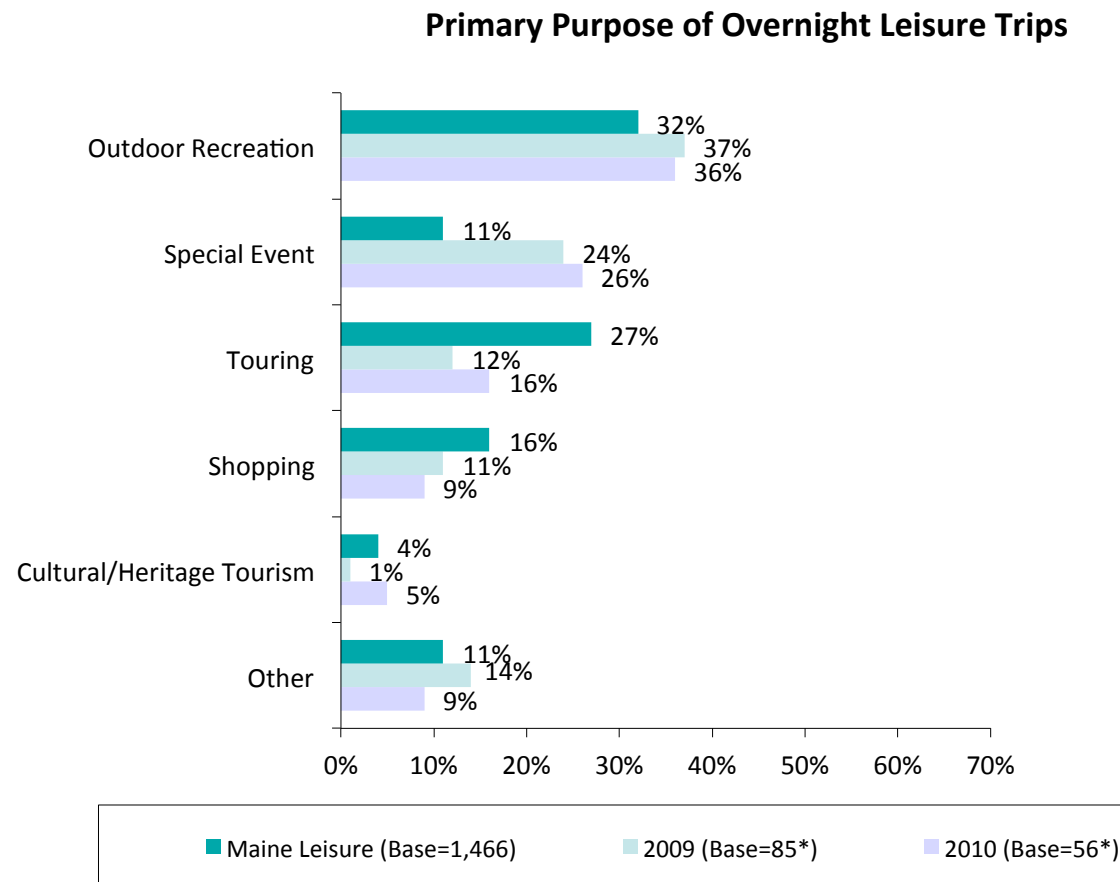
notes significant year-over-year difference at 95% confidence level

State/Province of residence.

*Please Note: Small sample sizes, use data for directional purposes only.

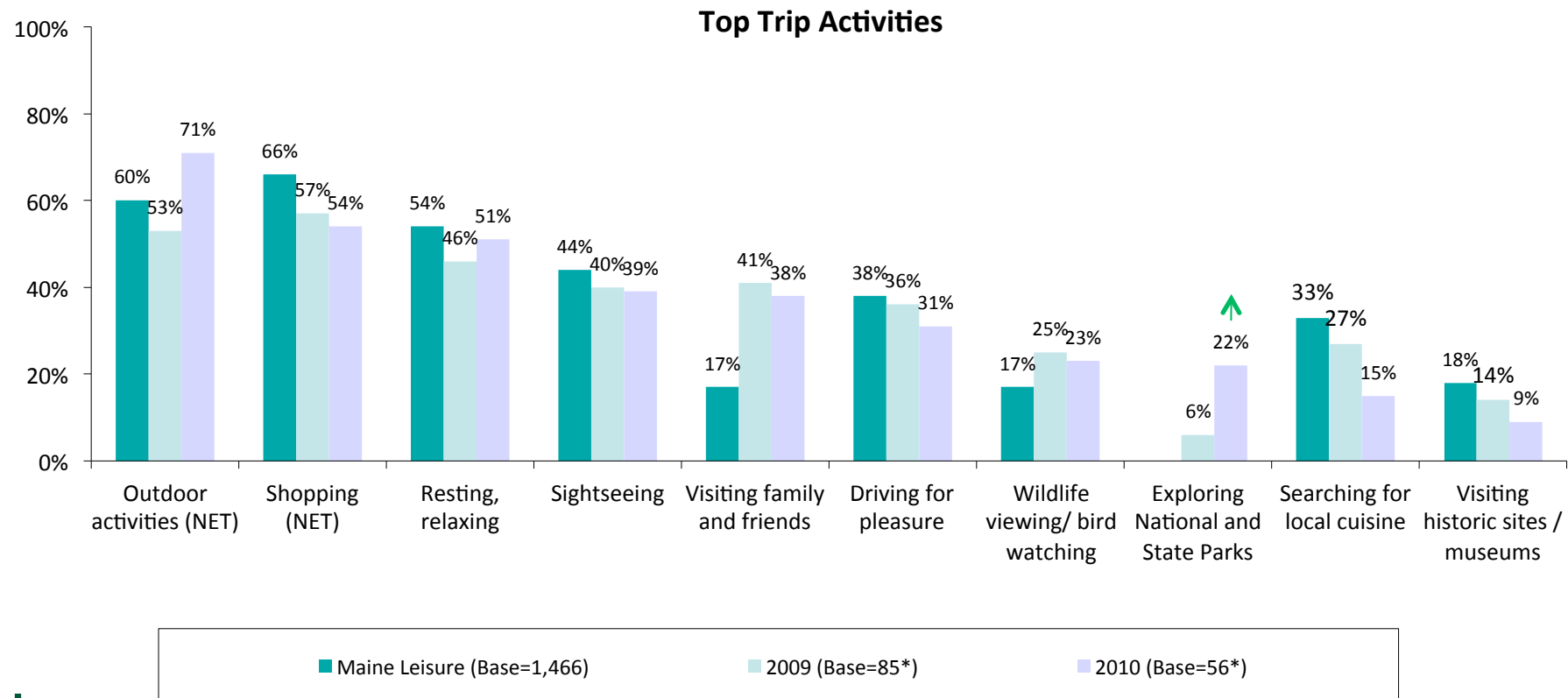
Primary Purpose of Overnight Leisure Trips: 2010 Annual Report Kennebec & Moose River Valley

- Slightly more than one-third of overnight leisure visitors to the Kennebec & Moose River Valley region reported that the primary purpose of their visit was outdoor recreation.



Overnight Leisure Trip Activities: Kennebec & Moose River Valley

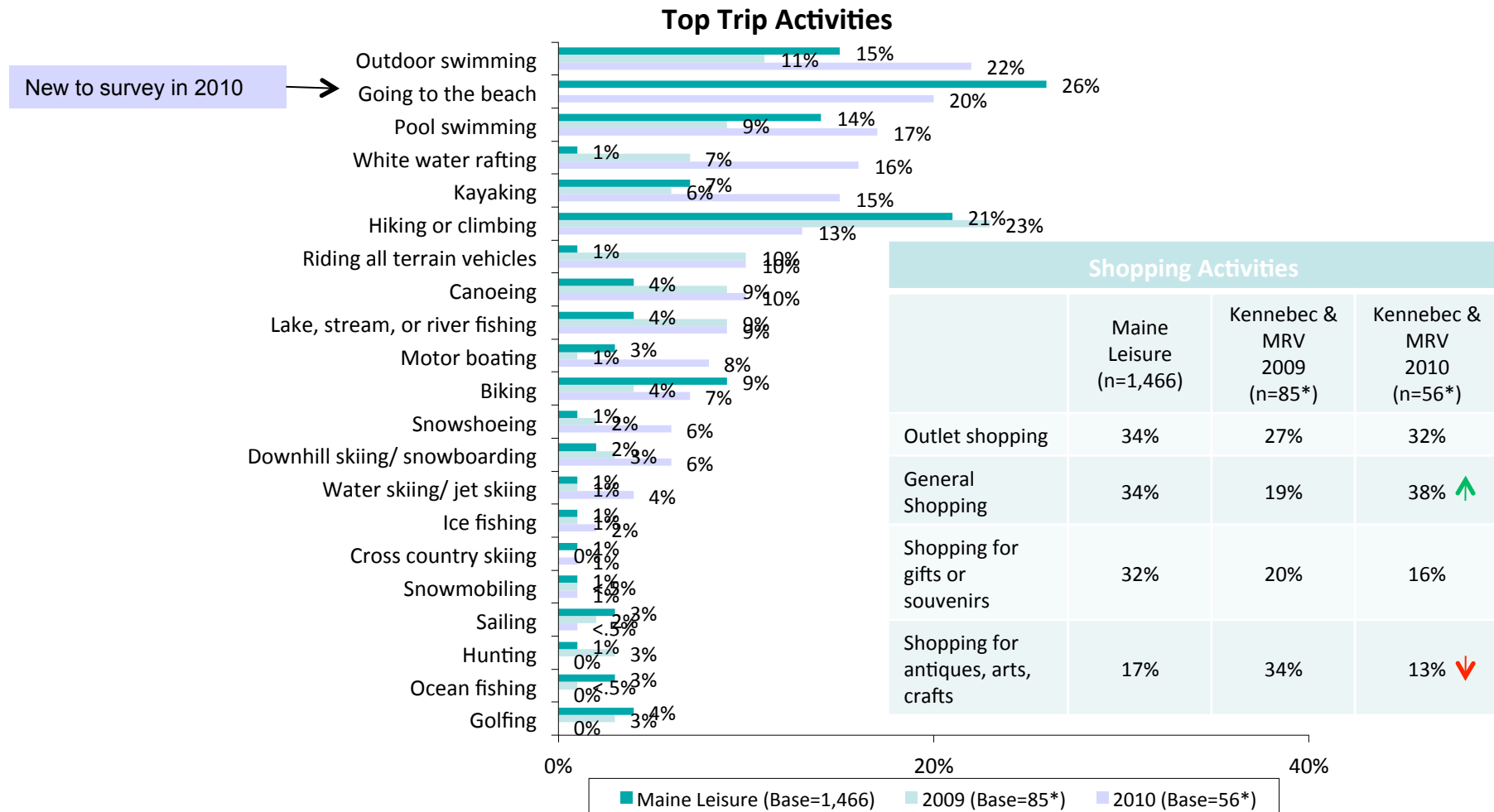
- Outdoor recreation, shopping, and resting are all cited as trip activities enjoyed by approximately half of overnight leisure visitors to the Kennebec & Moose River Valley region.



Overnight Leisure Trip Activities: *Kennebec & Moose River Valley*

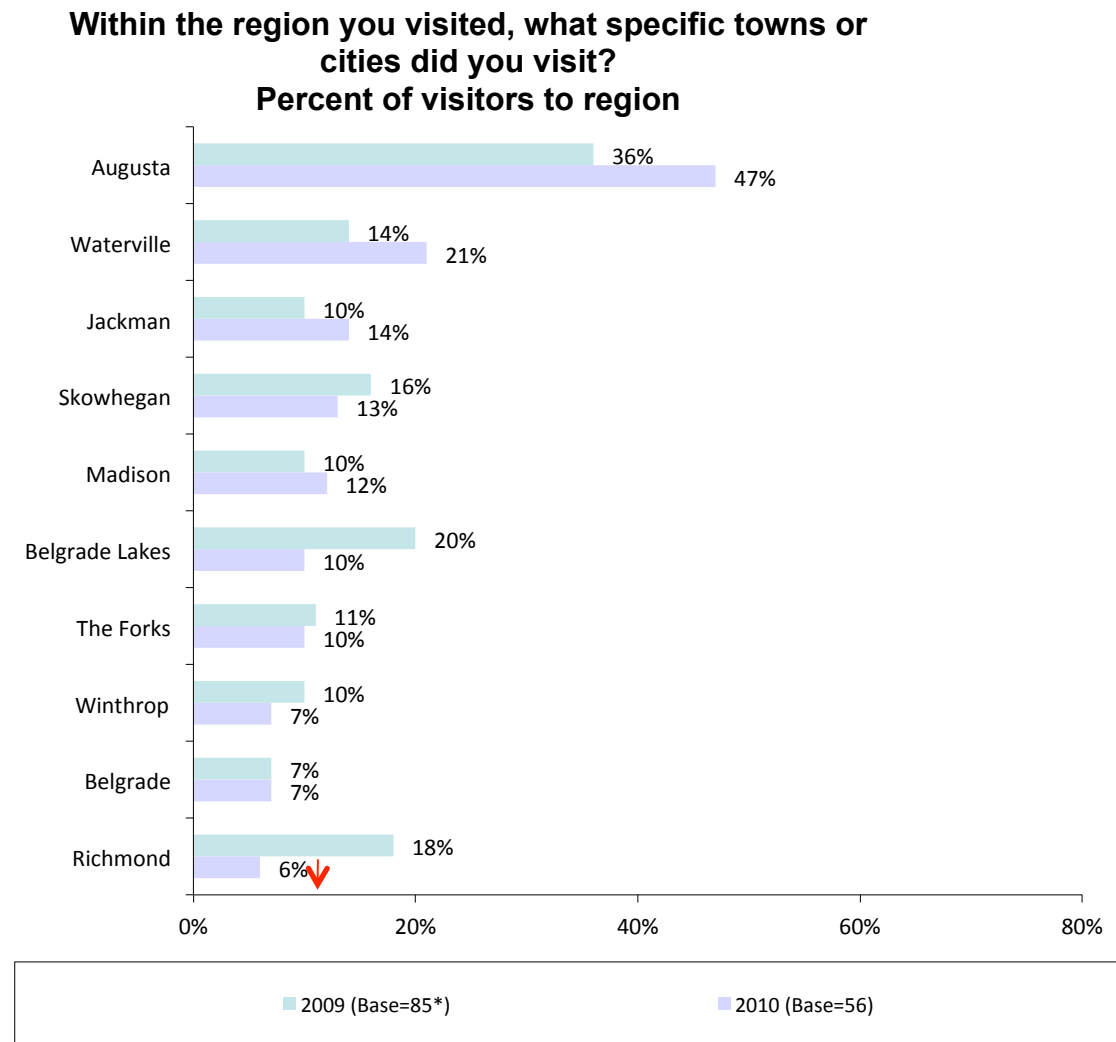
2010 Annual Report

- Visitors to the Kennebec and Moose River Valley were more likely to do general shopping and less likely to shop for antiques, arts and crafts in 2010 than in 2009.



Overnight Leisure Visitor Towns & Cities Visited: *Kennebec & Moose River Valley*

2010 Annual Report



Day Leisure Visitor Demographics: *Kennebec & Moose River Valley*

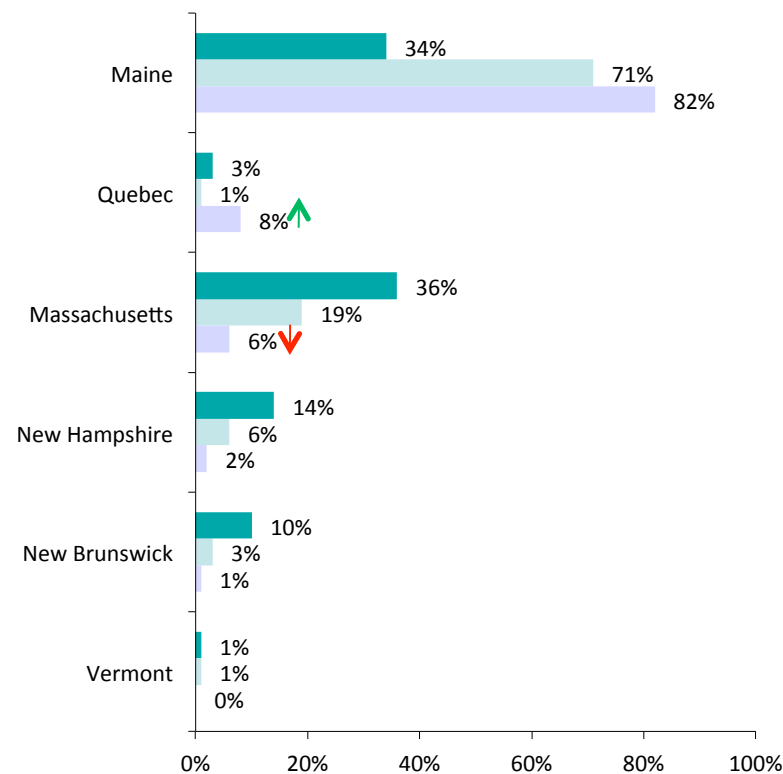
2010 Annual Report

- The Kennebec & Moose River Valley region saw a statistically significant year-over-year increase in the mean age of day visitors to the region from 2009 to 2010.

	Maine Leisure (Base=1,175)	2009 (Base=70*)	2010 (Base=56*)
Mean Age	46.8	40.2	46.8 ↑
< 35	27%	40%	27%
35 - 44	17%	17%	17%
45 - 54	20%	20%	23%
55 +	36%	23%	34%
Mean Income	\$92,950	\$76,510	\$80,140
< \$50,000	21%	41%	27%
\$50,000 - \$99,000	43%	38%	43%
\$100,000 +	36%	21%	30%
Female	51%	49%	42%
College Degree or Higher	73%	57%	77%
Married	62%	60%	52%
Employed Full Time	58%	52%	58%

Day Leisure Visitor Residence: Kennebec & Moose River Valley

- As was the case in 2009, the vast majority of leisure day visitors to the Kennebec & Moose River Valley region were from Maine. However, there was a significant increase in visitors from Quebec as well as a significant decrease in visitors from Massachusetts in 2010.



■ Maine Leisure (Base=1,175) ■ 2009 (Base=70*) ■ 2010 (Base=56*)

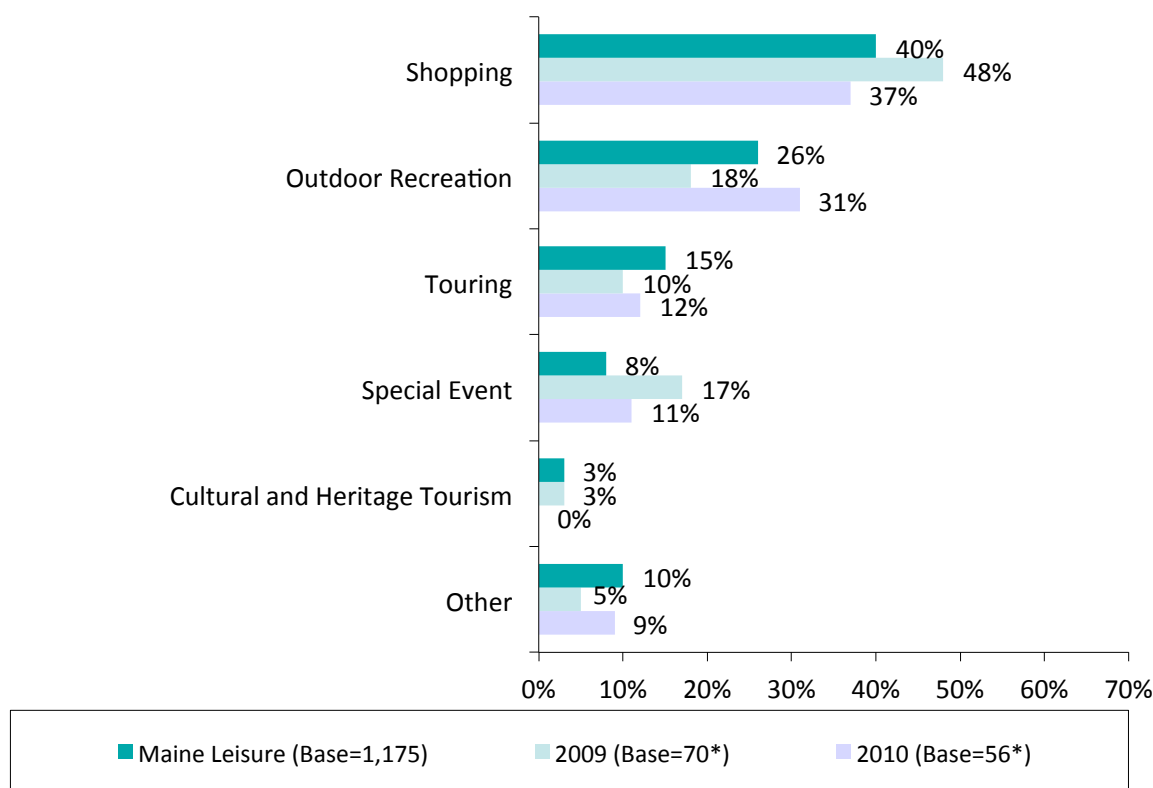
Day Q1A. In what State or Province do you reside?

↑ ↓ notes significant year-over-year difference at 95% confidence level
 *Please Note: Small sample sizes, use data for directional purposes only.

Primary Purpose of Day Leisure Trips: Kennebec & Moose River Valley

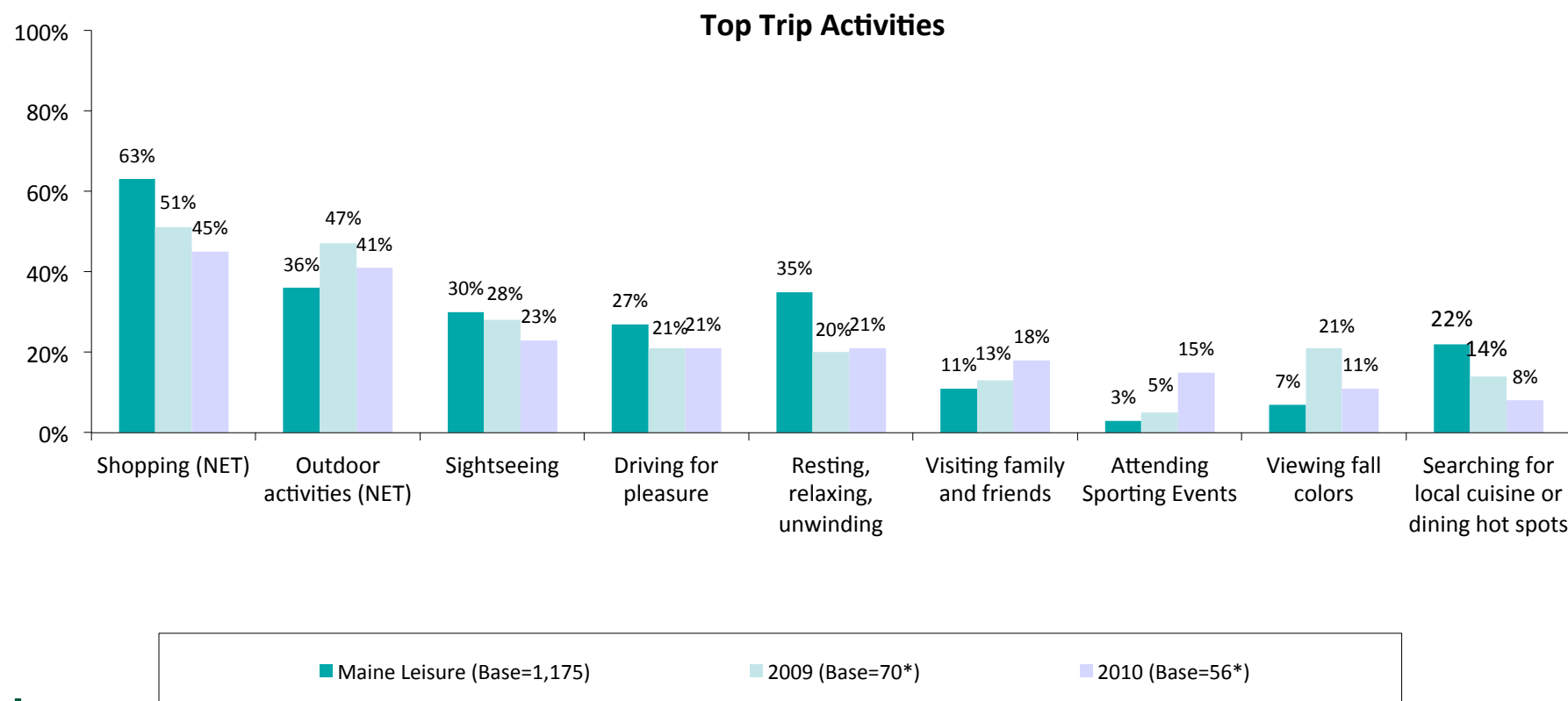
- Shopping is the top primary trip purpose among leisure day visitors to the Kennebec region. This is likely due to the shopping centers around Augusta and Waterville that bring residents from other areas of the state to this region to shop. Not surprisingly, outdoor recreation is also cited by nearly one out of three day visitors to the region as their primary trip purpose.

Primary Purpose of Day Leisure Trips



Day Leisure Trip Activities: Kennebec & Moose River Valley

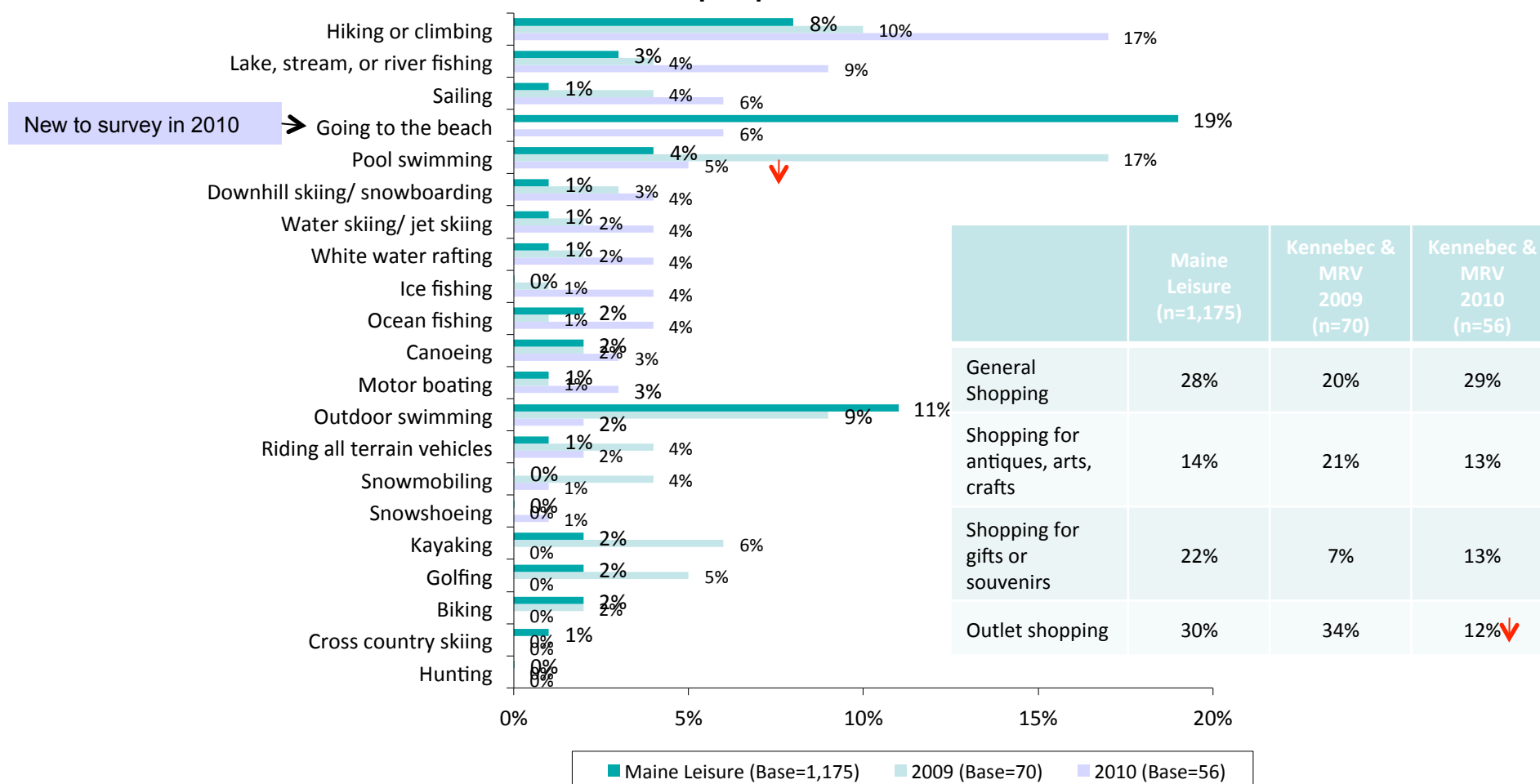
- Shopping and outdoor recreation were each cited as trip activities by almost half of leisure day visitors to the Kennebec region in 2010. This underscores the importance of both activities for leisure day visitation to this region of Maine.



Day Leisure Trip Activities: *Kennebec & Moose River Valley*

- There was a decrease in outlet shopping in 2010. Also, a smaller proportion of day visitors went swimming in pools in 2010 than in 2009.

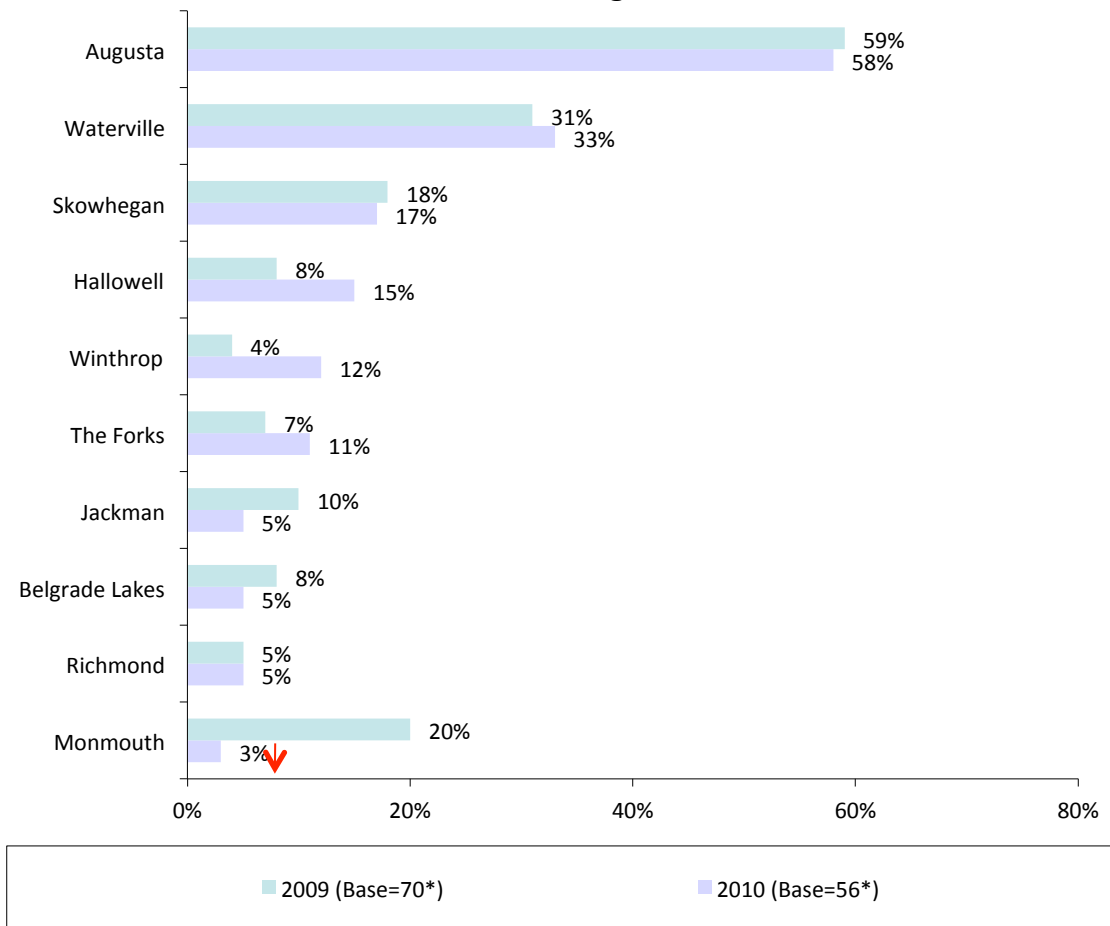
Top Trip Activities



Day Leisure Visitor Towns & Cities Visited: 2010 Annual Report

Kennebec & Moose River Valley

Within the region you visited, what specific towns or cities did you visit?
Percent of visitors to region



Regional Insights: Maine Highlands



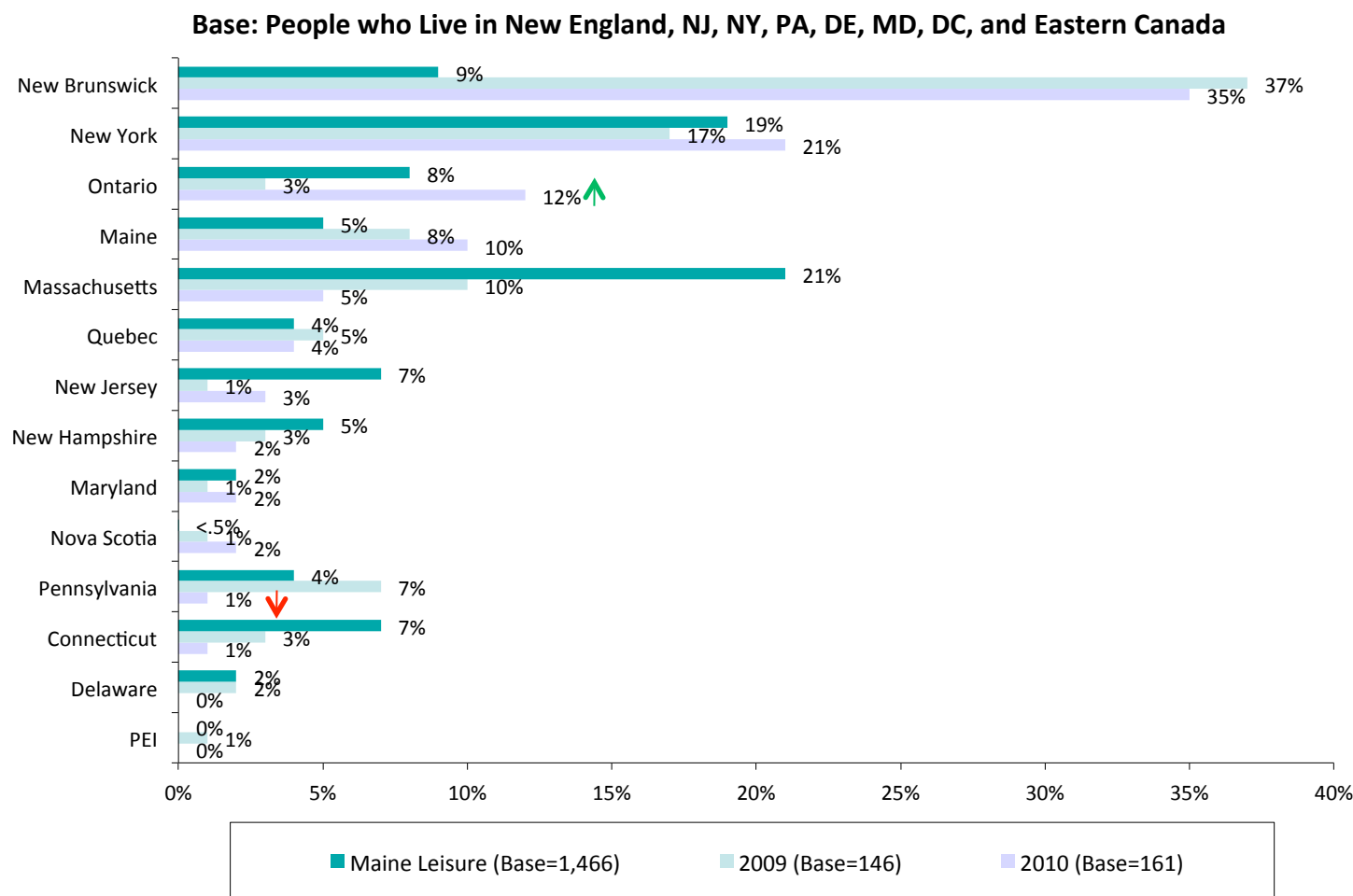
Overnight Leisure Visitor Demographics: *The Maine Highlands* 2010 Annual Report

- There were no statistically significant changes in the demographic profile of overnight leisure visitors to the Maine Highlands between 2009 and 2010.

	Maine Leisure (Base=1,466)	2009 (Base=146)	2010 (Base=161)
Mean Age	45.2	42.6	41.9
< 35	28%	35%	33%
35 - 44	19%	17%	21%
45 - 54	24%	26%	26%
55 +	30%	22%	20%
Mean Income	\$106,700	\$105,800	\$94,010
< \$50,000	11%	29%	14%
\$50,000 - \$99,000	37%	27%	37%
\$100,000 +	36%	38%	34%
Female	47%	46%	41%
College Degree or Higher	76%	72%	71%
Married	61%	51%	61%
Employed Full Time	60%	71%	62%

Overnight Leisure Visitor Residence: *The Maine Highlands*

- New Brunswick continues to be the largest source of overnight leisure visitors to this region, representing more than one-third of these visitors to the Maine Highlands. Notably, visitation from Ontario increased significantly in 2010 while Pennsylvania saw a significant decrease.

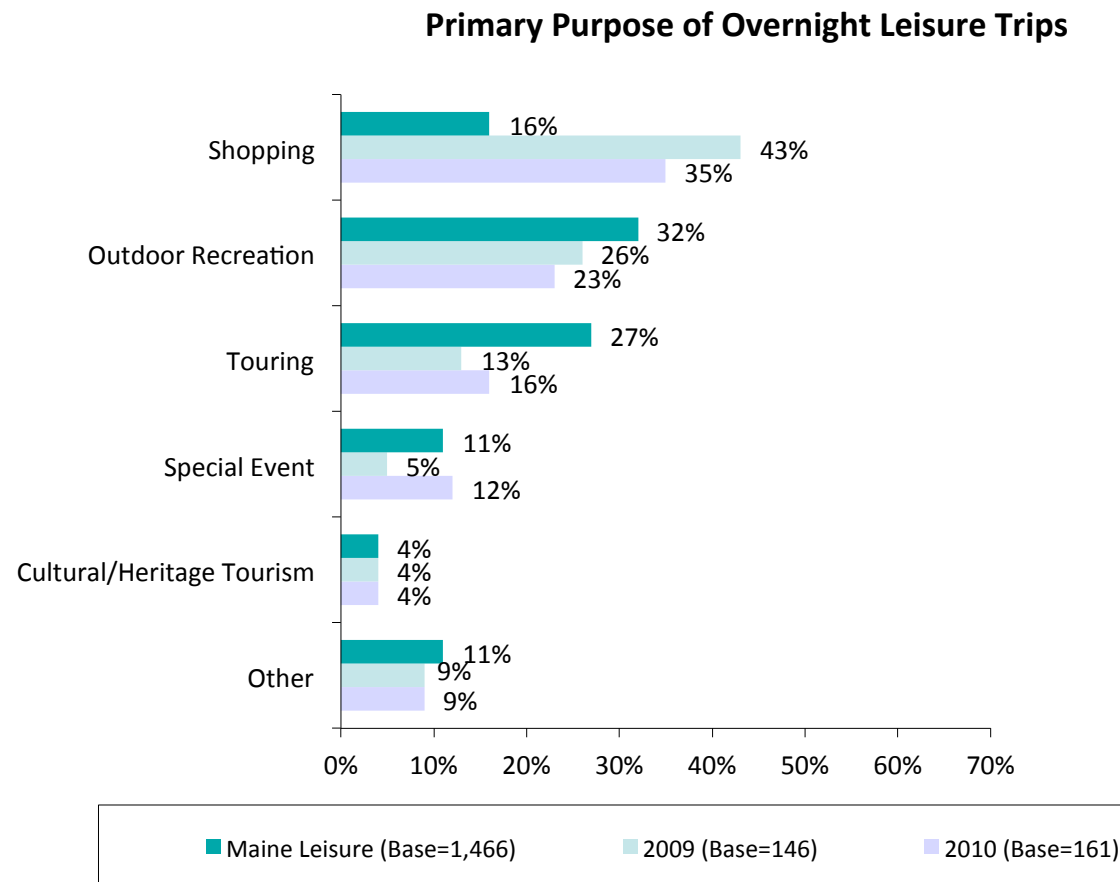


↑ ↓ notes significant year-over-year difference at 95% confidence level

State/Province of residence.

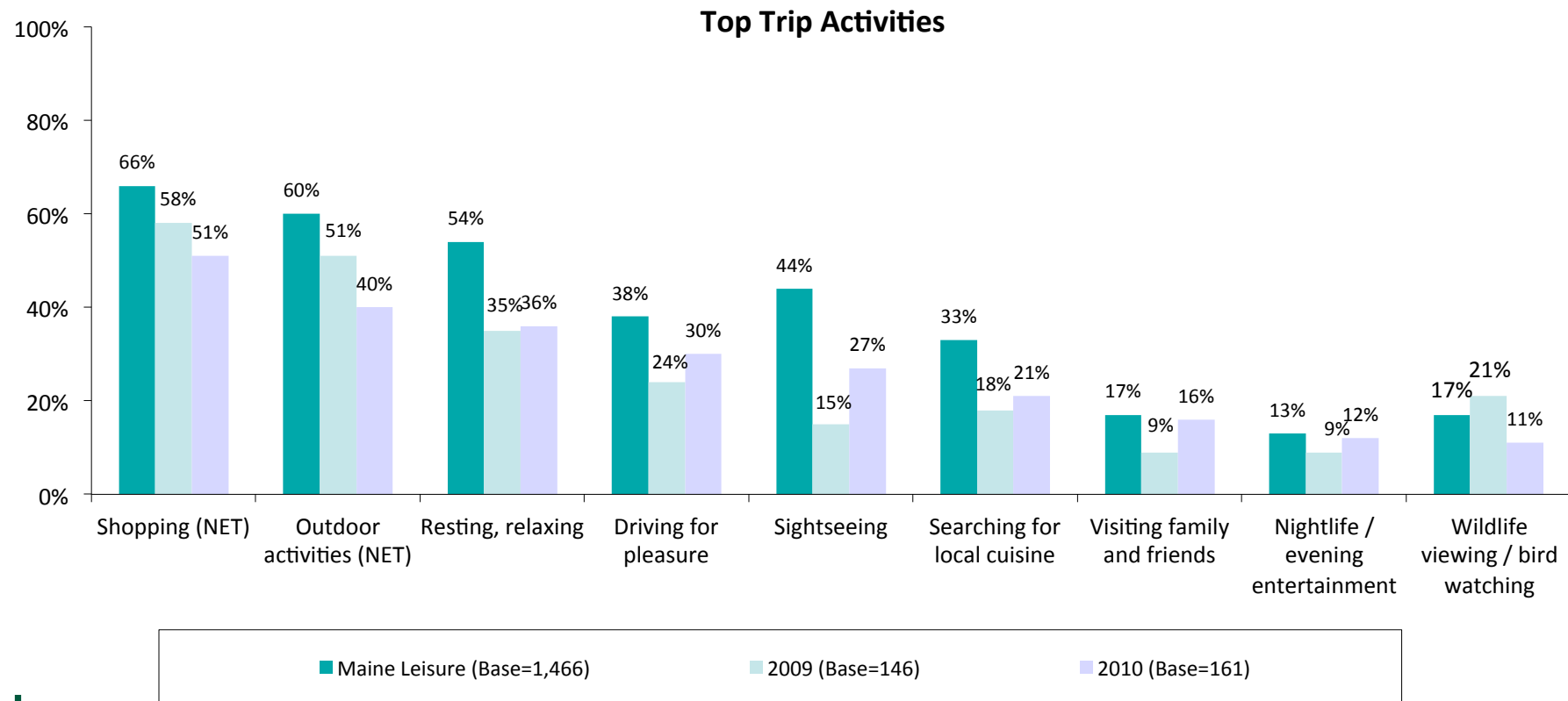
Primary Purpose of Overnight Leisure Trips: *The Maine Highlands*

- Shopping continues to be a popular primary trip purpose for overnight leisure visitors to this region. This is likely a function of the strong visitation from New Brunswick, as Canadians often come over the border to take advantage of shopping opportunities in Maine.



Overnight Leisure Trip Activities: The Maine Highlands

- Shopping was the most widely cited trip activity among overnight leisure visitors to the Maine Highlands. However, it's also important to note that approximately two in five overnight leisure visitors to this region reported that they participated in outdoor activities during their visit.

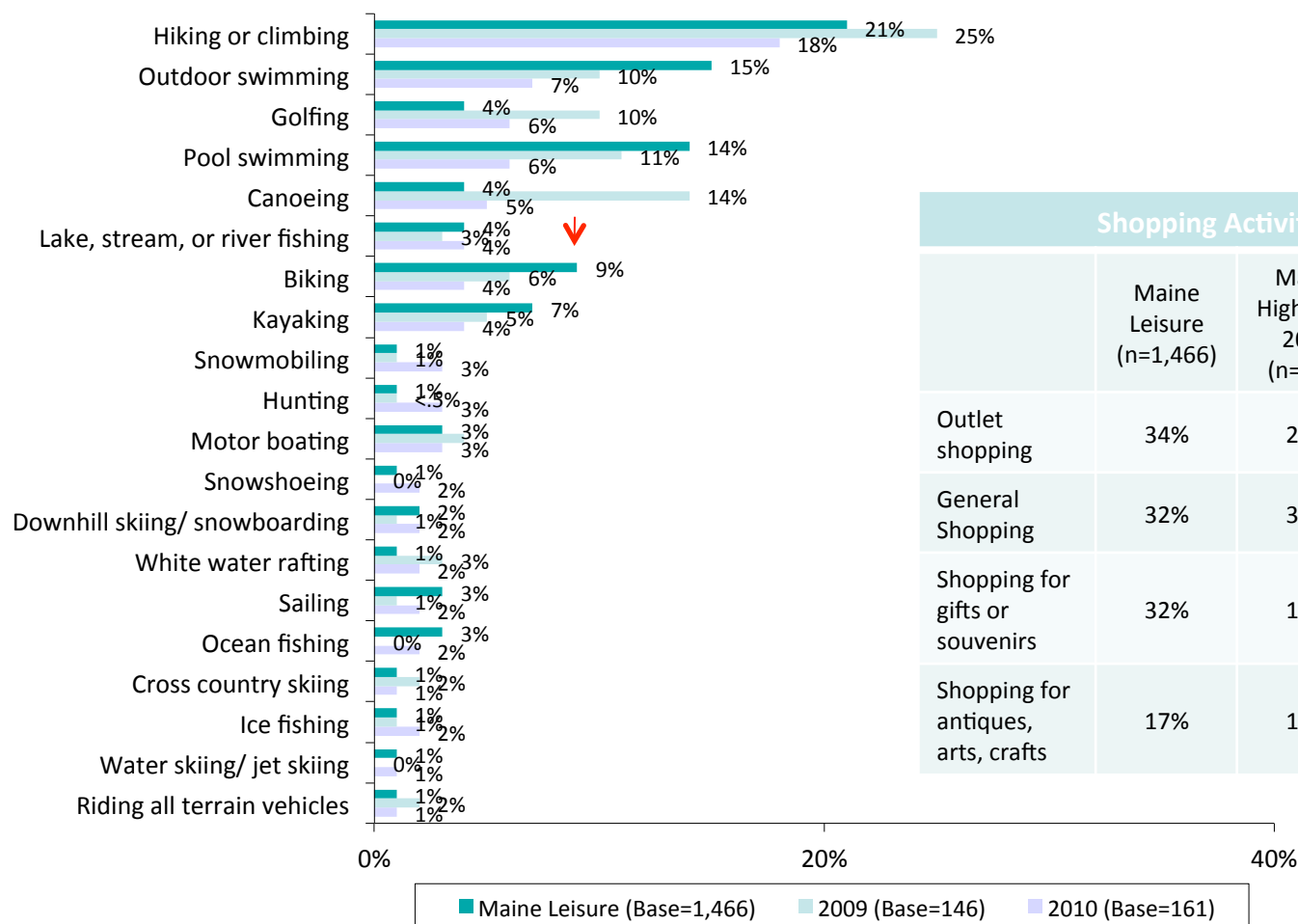


Overnight Leisure Trip Activities: *The Maine Highlands*

2010 Annual Report

- Overall visitors to the Maine Highlands continue to enjoy a variety of outdoor activities, although there was a decrease in the share of visitors who went canoeing.

Outdoor Activities



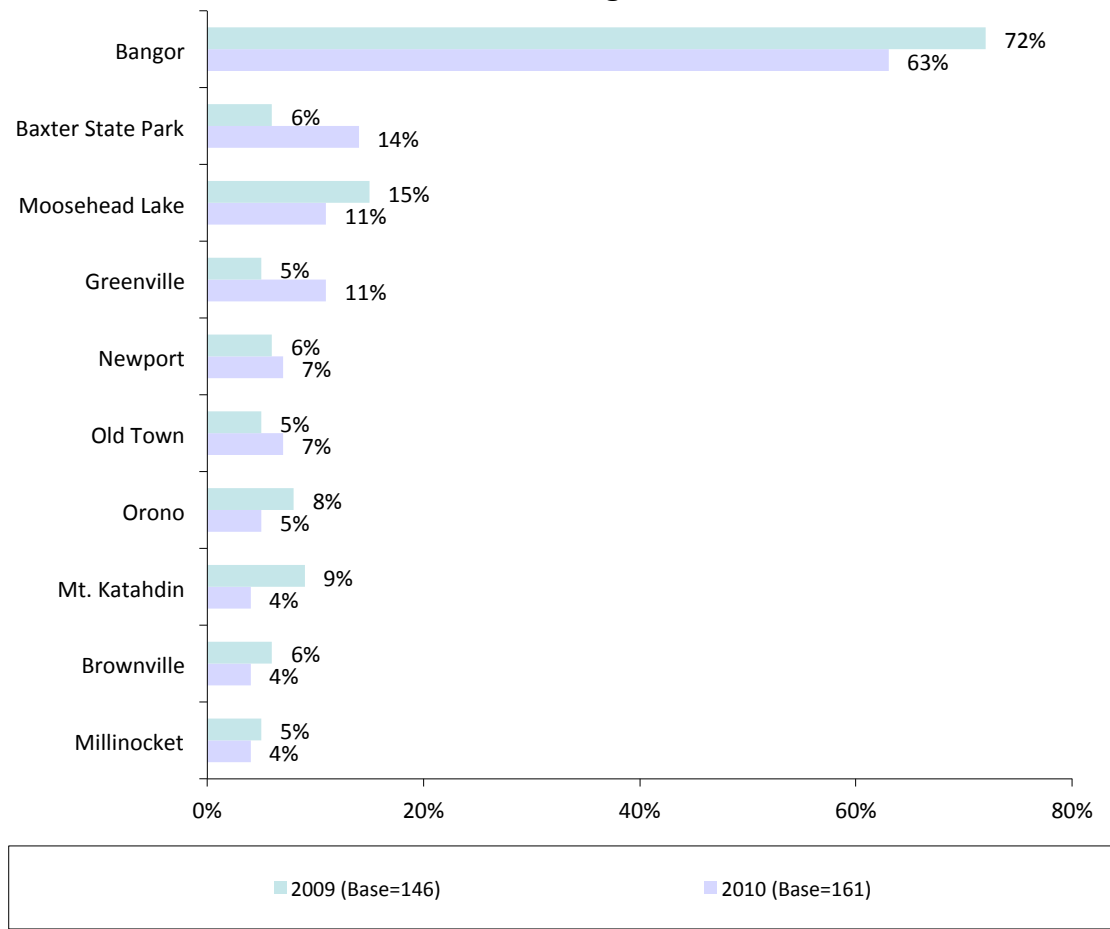
Shopping Activities

	Maine Leisure (n=1,466)	Maine Highlands 2009 (n=146)	Maine Highlands 2010 (n=161)
Outlet shopping	34%	25%	23%
General Shopping	32%	34%	37%
Shopping for gifts or souvenirs	32%	19%	25%
Shopping for antiques, arts, crafts	17%	10%	8%

Overnight Leisure Visitor Towns & Cities Visited: *The Maine Highlands*

2010 Annual Report

Within the region you visited, what specific towns or cities did you visit?
Percent of visitors to region



Day Leisure Visitor Demographics: *The Maine Highlands*

2010 Annual Report

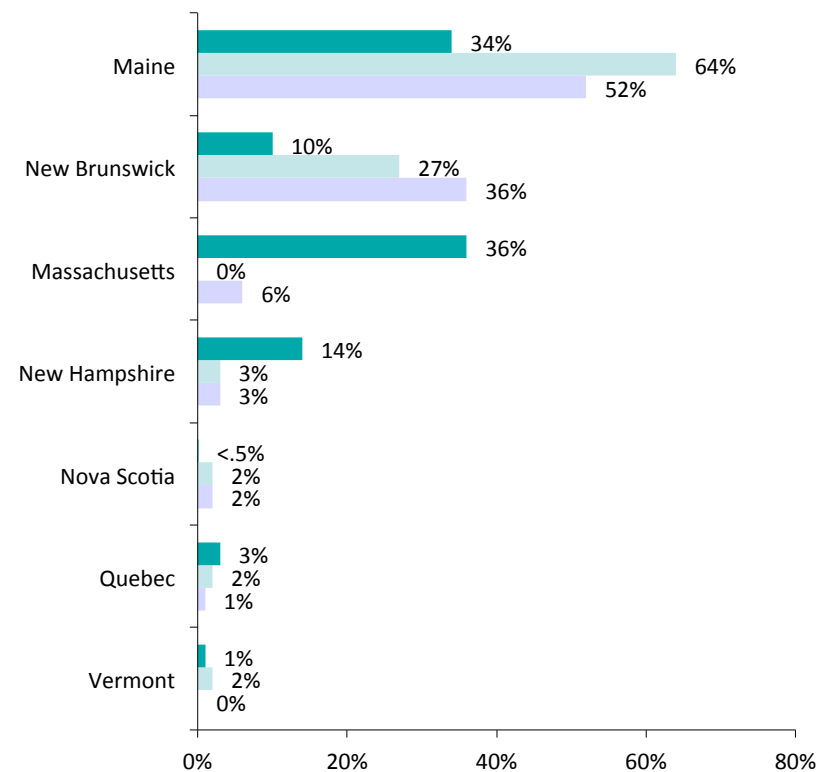
- The Maine Highlands day visitors in 2010 are more likely to be 45-54 year olds and have a higher average household income than visitors in 2009.

	Maine Leisure (Base=1,175)	2009 (Base=116)	2010 (Base=100)
Mean Age	46.8	41.9	45.0
< 35	27%	35%	28%
35 - 44	17%	23%	19%
45 - 54	20%	15%	28% ↑
55 +	36%	27%	26%
Mean Income	\$92,950	\$72,500	\$89,110 ↑
< \$50,000	21%	33%	24%
\$50,000 - \$99,000	43%	47%	44%
\$100,000 +	36%	20%	32%
Female	51%	55%	53%
College Degree or Higher	73%	68%	59%
Married	62%	55%	62%
Employed Full Time	58%	57%	64%

Day Leisure Visitor Residence: *The Maine Highlands*

2010 Annual Report

- The residence of day visitors to the Maine Highlands remained statistically stable. Maine and New Brunswick continue to represent over 80% of visitation to the Maine Highlands.



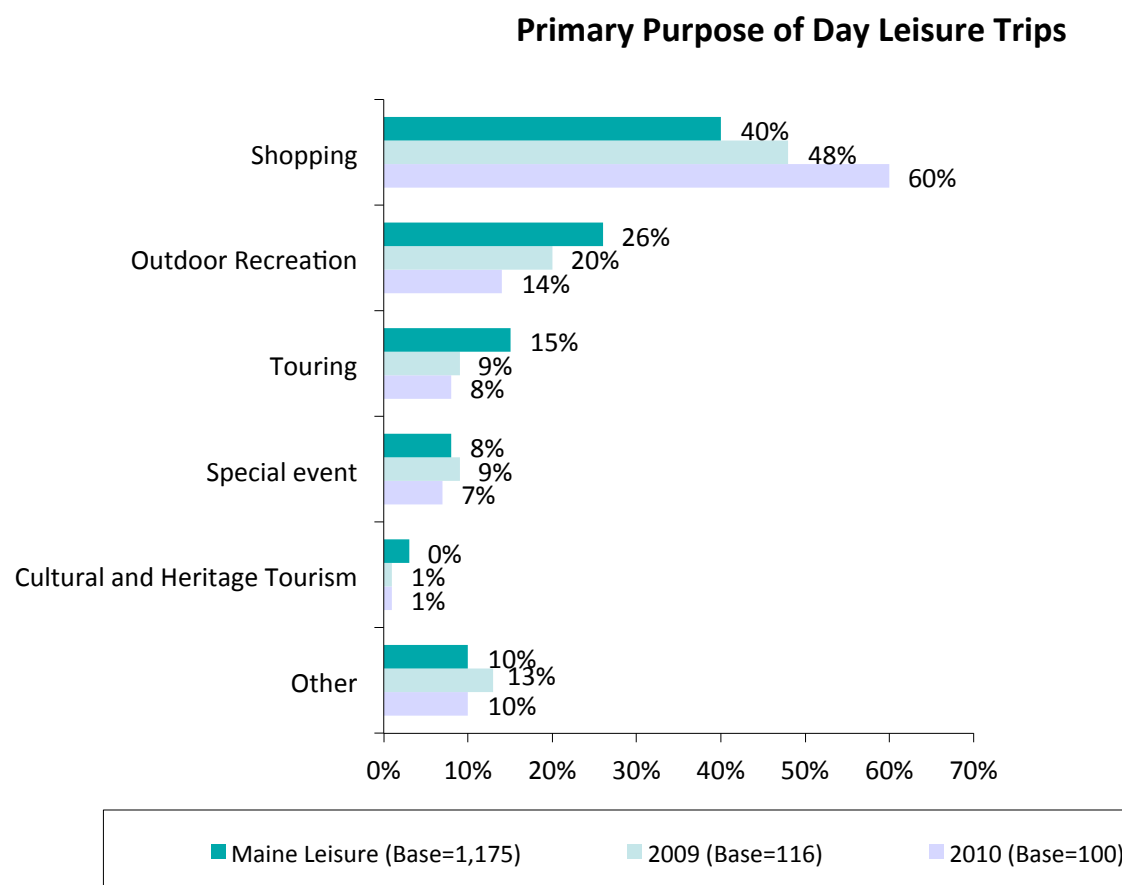
■ Maine Leisure (Base=1,175) ■ 2009 (Base=116) ■ 2010 (Base=100)

Day Q1A. In what State or Province do you reside?

↑↓ notes significant year-over-year difference at 95% confidence level

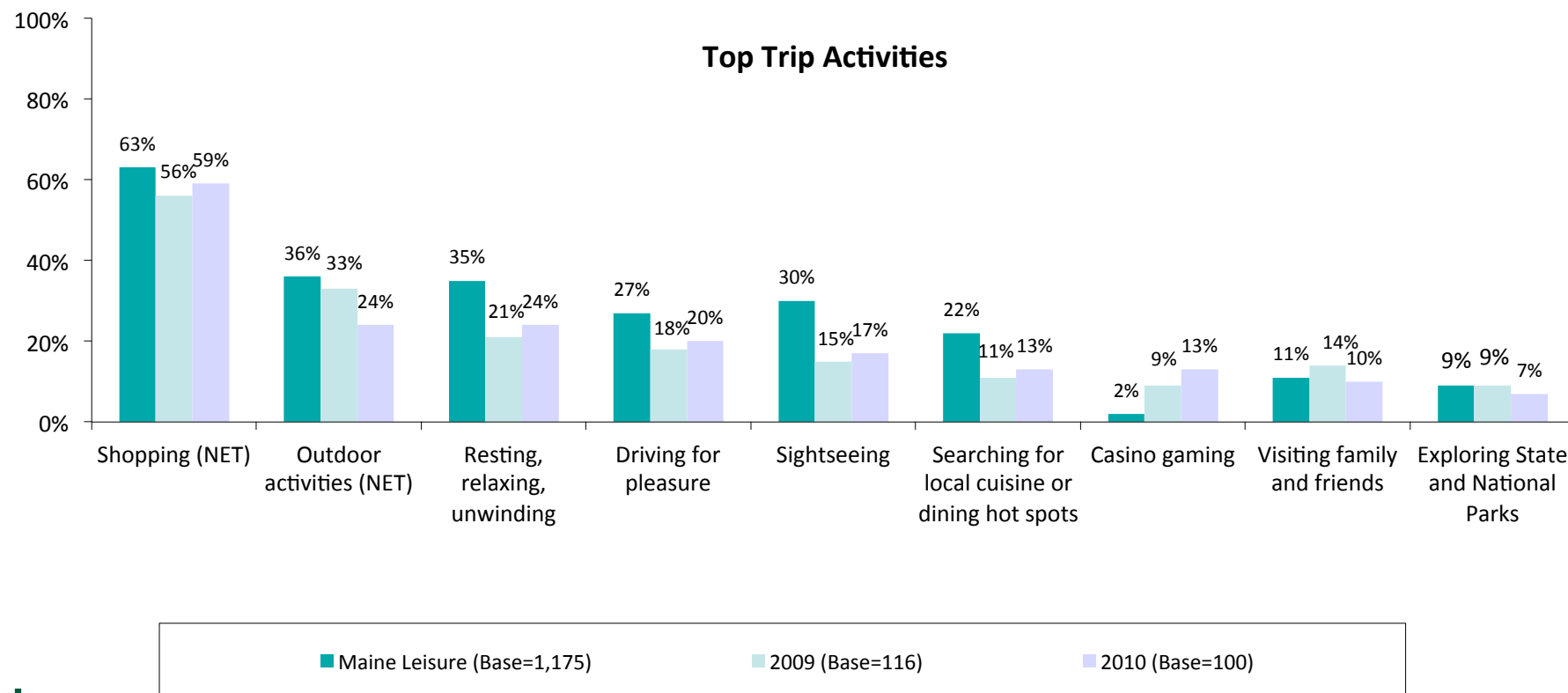
Primary Purpose of Day Leisure Trips: *The Maine Highlands*

- Shopping remained the most frequently cited primary trip purpose among leisure day visitors to this region.



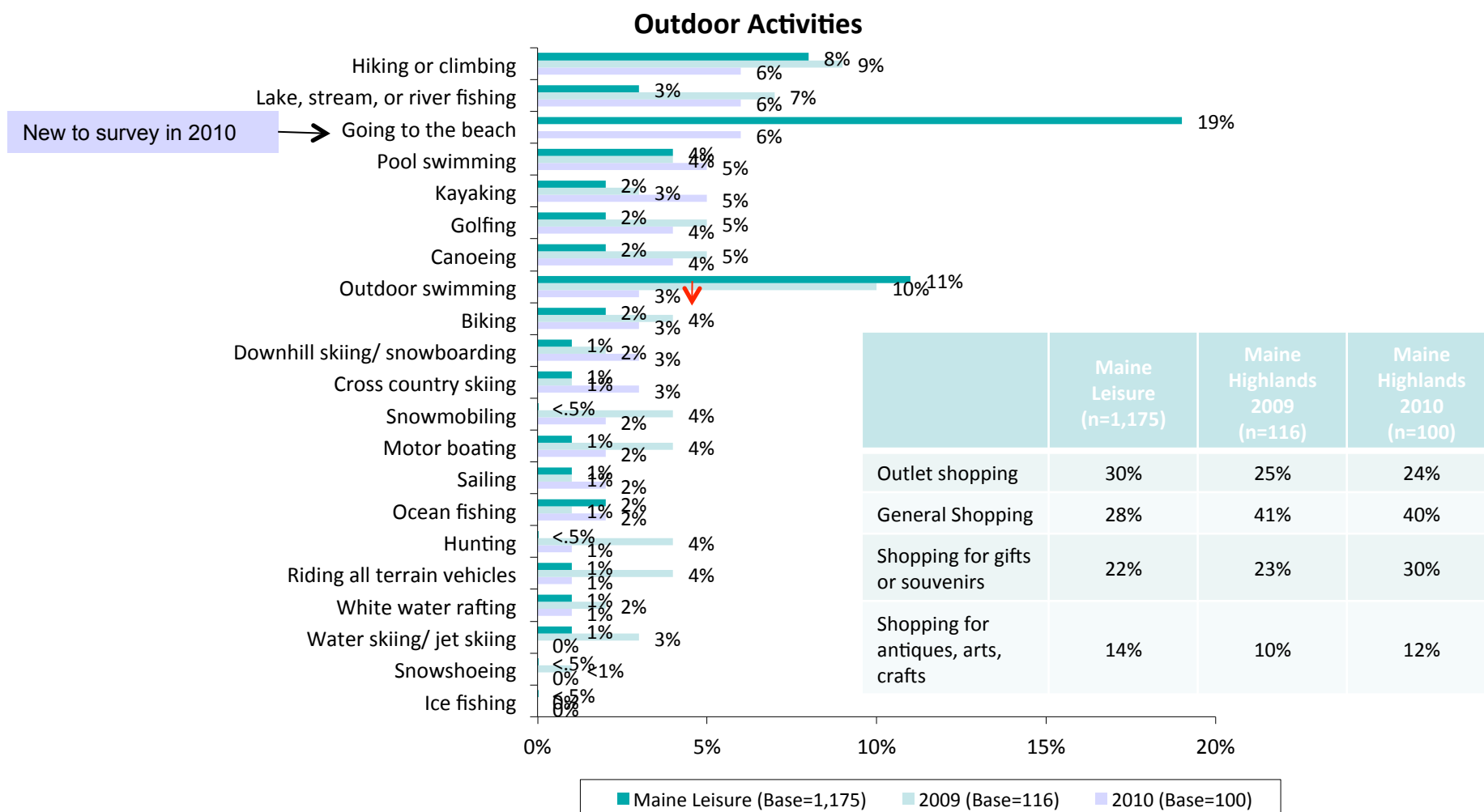
Day Leisure Trip Activities: The Maine Highlands

- Shopping is a popular trip activity among leisure day visitors to the Maine Highlands. Aside from shopping, one-quarter of leisure day visitors to the Maine Highlands reported that they engaged in outdoor recreation during their day visit to the region.



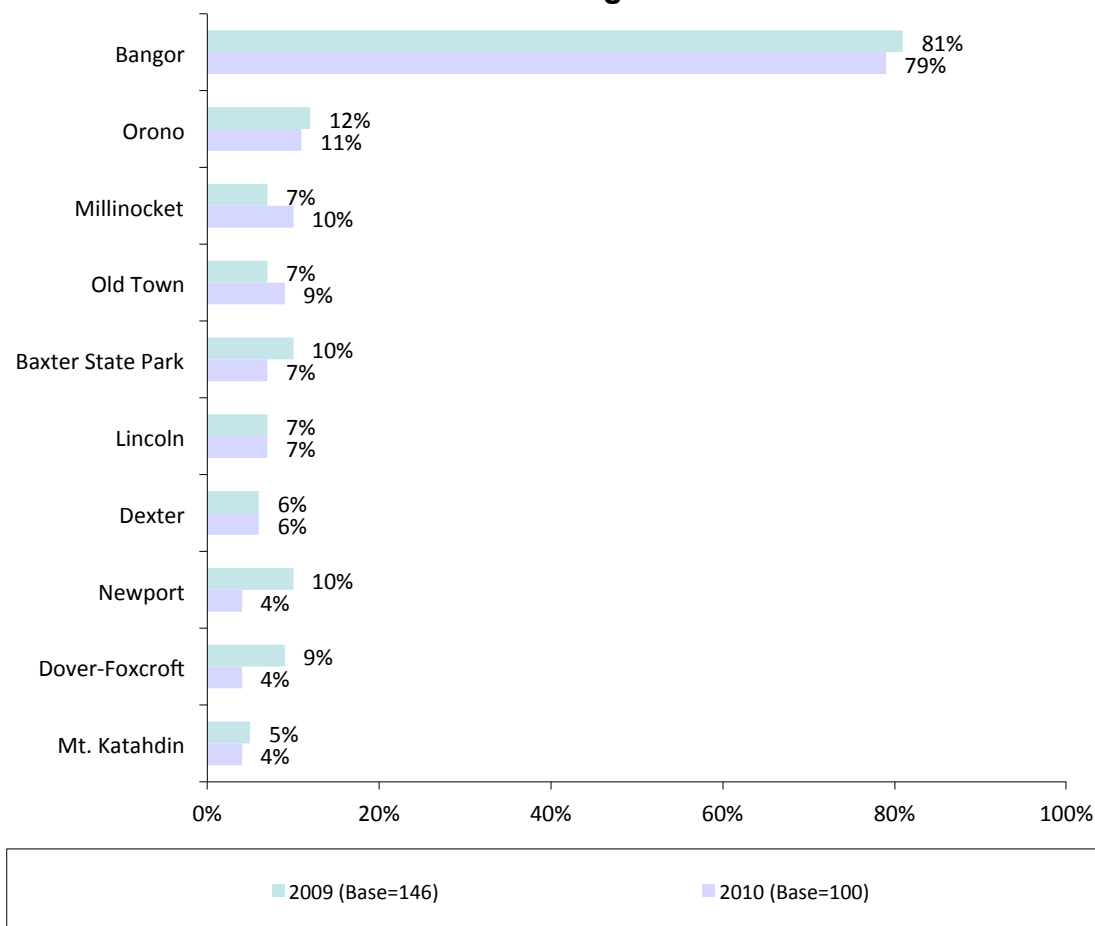
Day Leisure Trip Activities: *The Maine Highlands*

- Day visitors to the Maine Highlands in 2010 participated in a variety of outdoor activities, although outdoor swimming was down compared to 2009.



Day Leisure Visitor Towns & Cities Visited: *The Maine Highlands*

Within the region you visited, what specific towns or cities did you visit?
Percent of visitors to region



Regional Insights: Downeast & Acadia



Overnight Leisure Visitor Demographics: *Downeast & Acadia* 2010 Annual Report

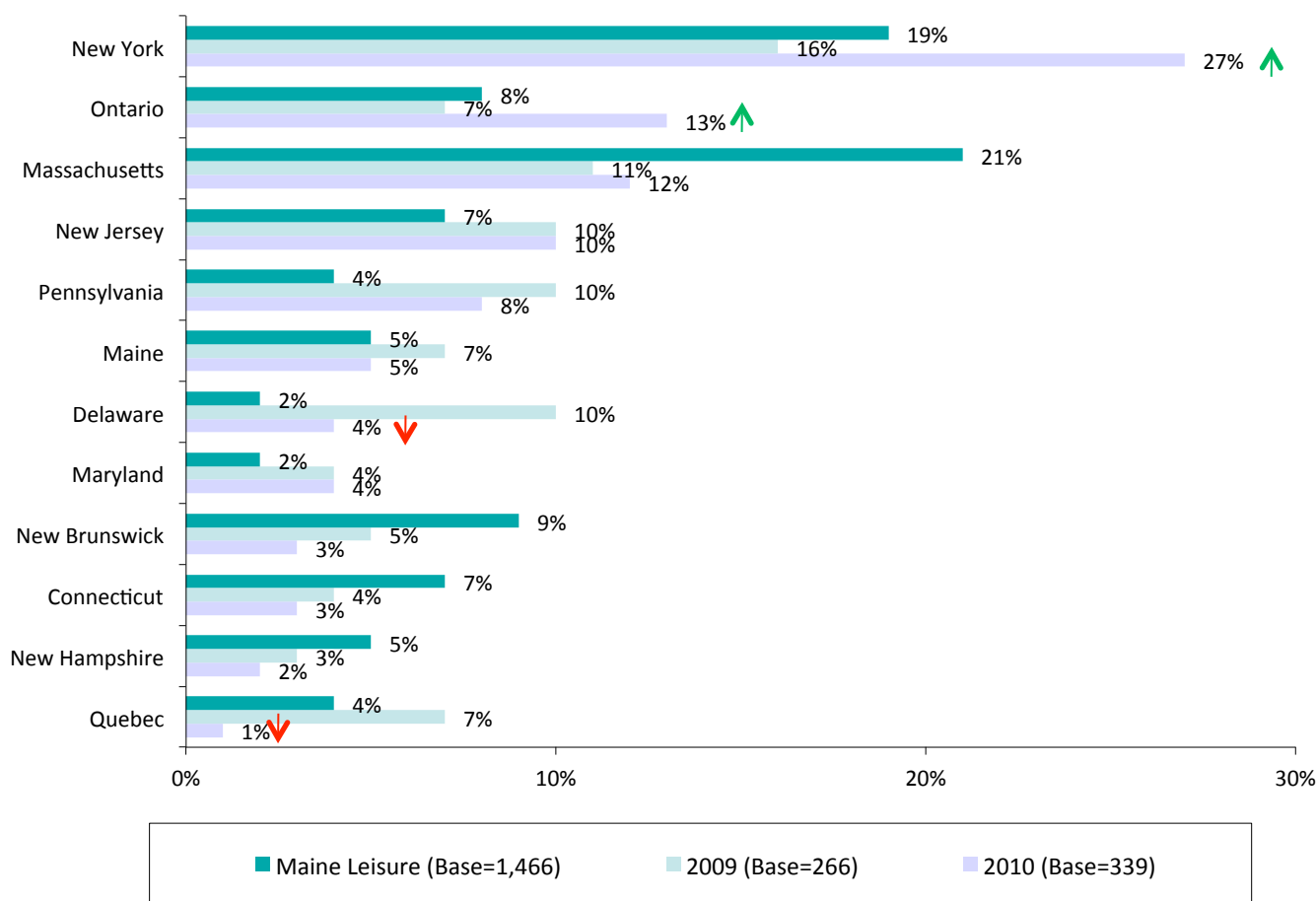
- Overnight visitors to the Downeast & Acadia region were similar in 2010 to those seen in 2009, although there is a statistically significant increase in females.

	Maine Leisure (Base=1,466)	2009 (Base=266)	2010 (Base=339)
Mean Age	45.2	44.7	46.2
< 35	28%	29%	24%
35 - 44	19%	21%	20%
45 - 54	24%	21%	24%
55 +	30%	29%	32%
Mean Income	\$106,700	\$110,800	\$120,800
< \$50,000	11%	11%	9%
\$50,000 - \$99,000	37%	32%	32%
\$100,000 +	36%	43%	43%
Female	47%	35%	47% ↑
College Degree or Higher	76%	84%	84%
Married	61%	63%	66%
Employed Full Time	60%	63%	61%

Overnight Leisure Visitor Residence: Downeast & Acadia

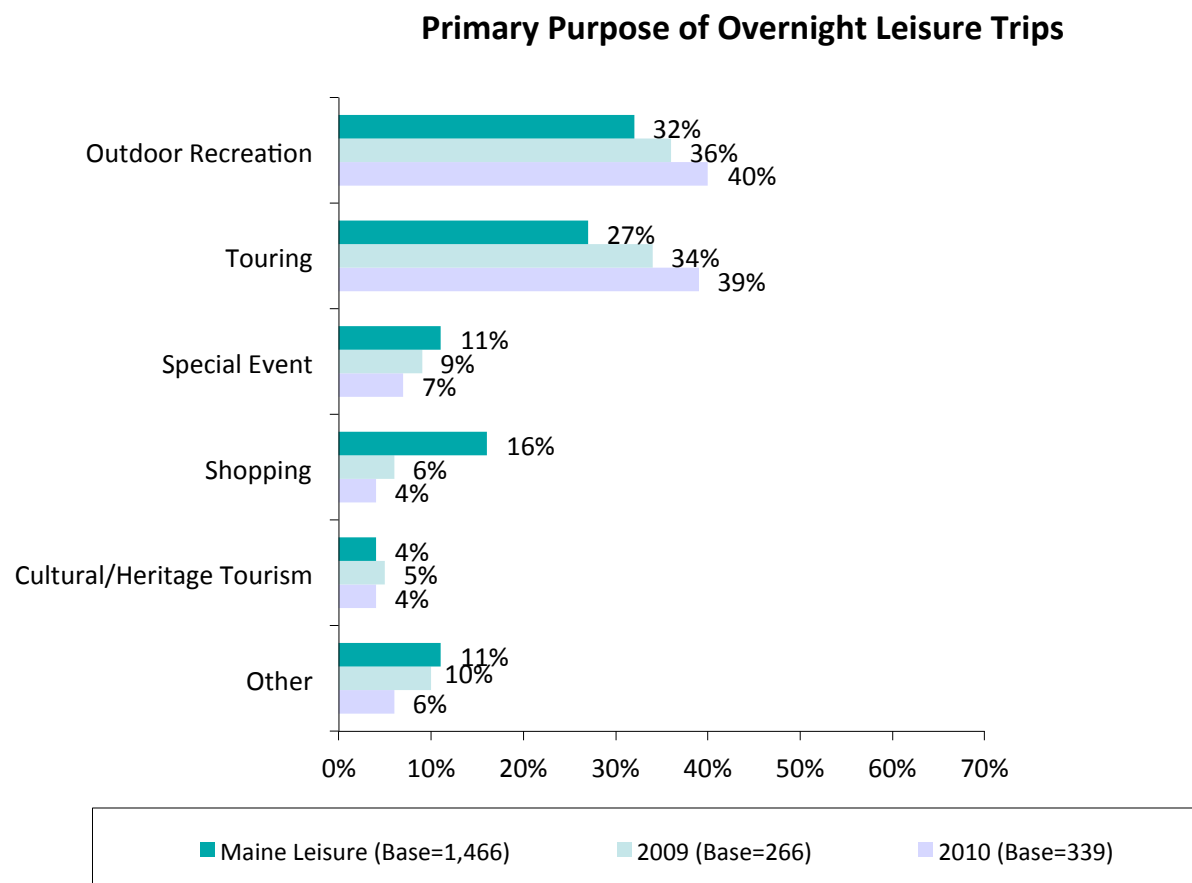
- Residents of New York and Ontario make up the largest percentage of overnight leisure visitors to the Downeast & Acadia region, with both increasing significantly from 2009 to 2010. It's also important to note that there were statistically significant year-over-year decreases in the percentage of overnight leisure visitors to this region from Delaware and Quebec.

Base: People who Live in New England, NJ, NY, PA, DE, MD, DC, and Eastern Canada



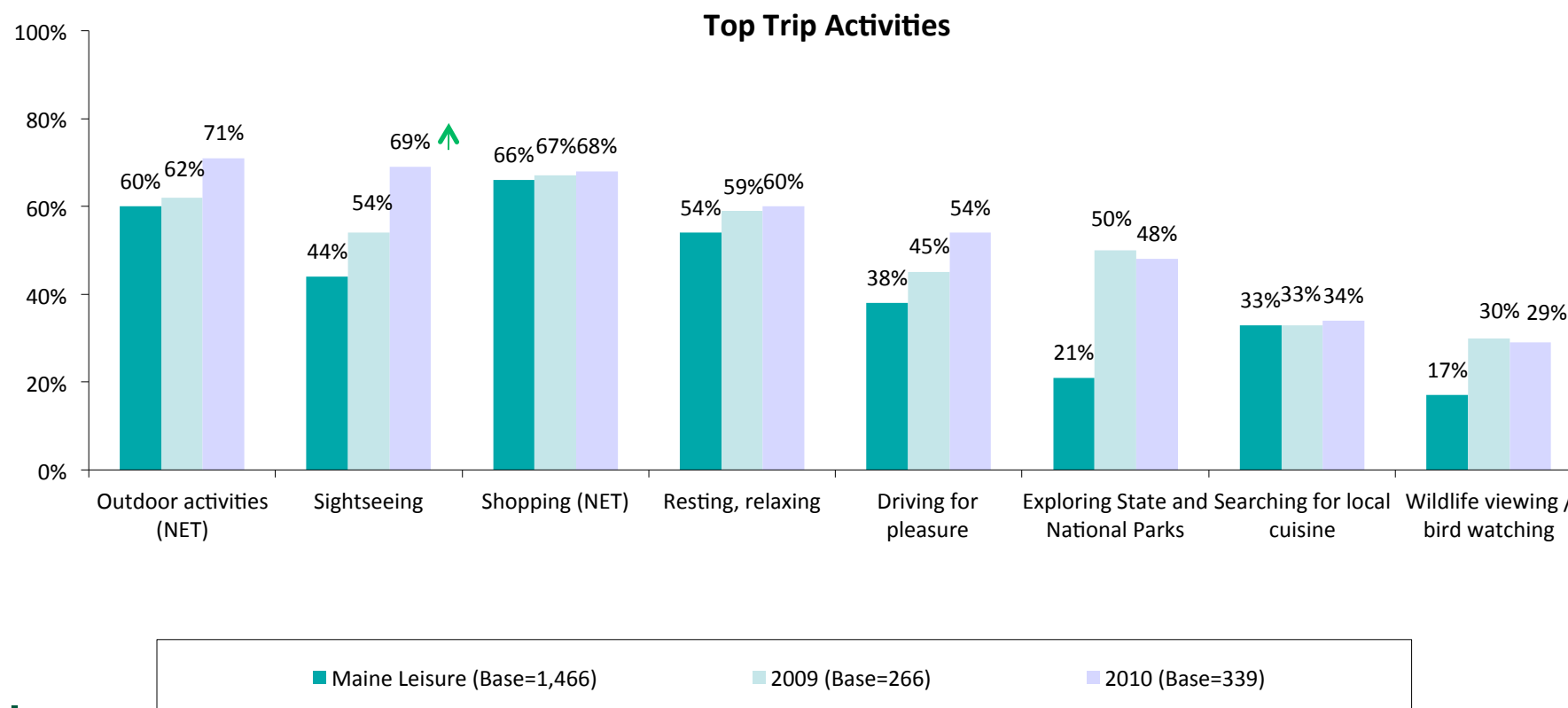
Primary Purpose of Overnight Leisure Trips: Downeast & Acadia

- Outdoor recreation and touring remain the most popular primary trip purposes for overnight leisure visitors to the Downeast & Acadia region.



Overnight Leisure Trip Activities: Downeast & Acadia

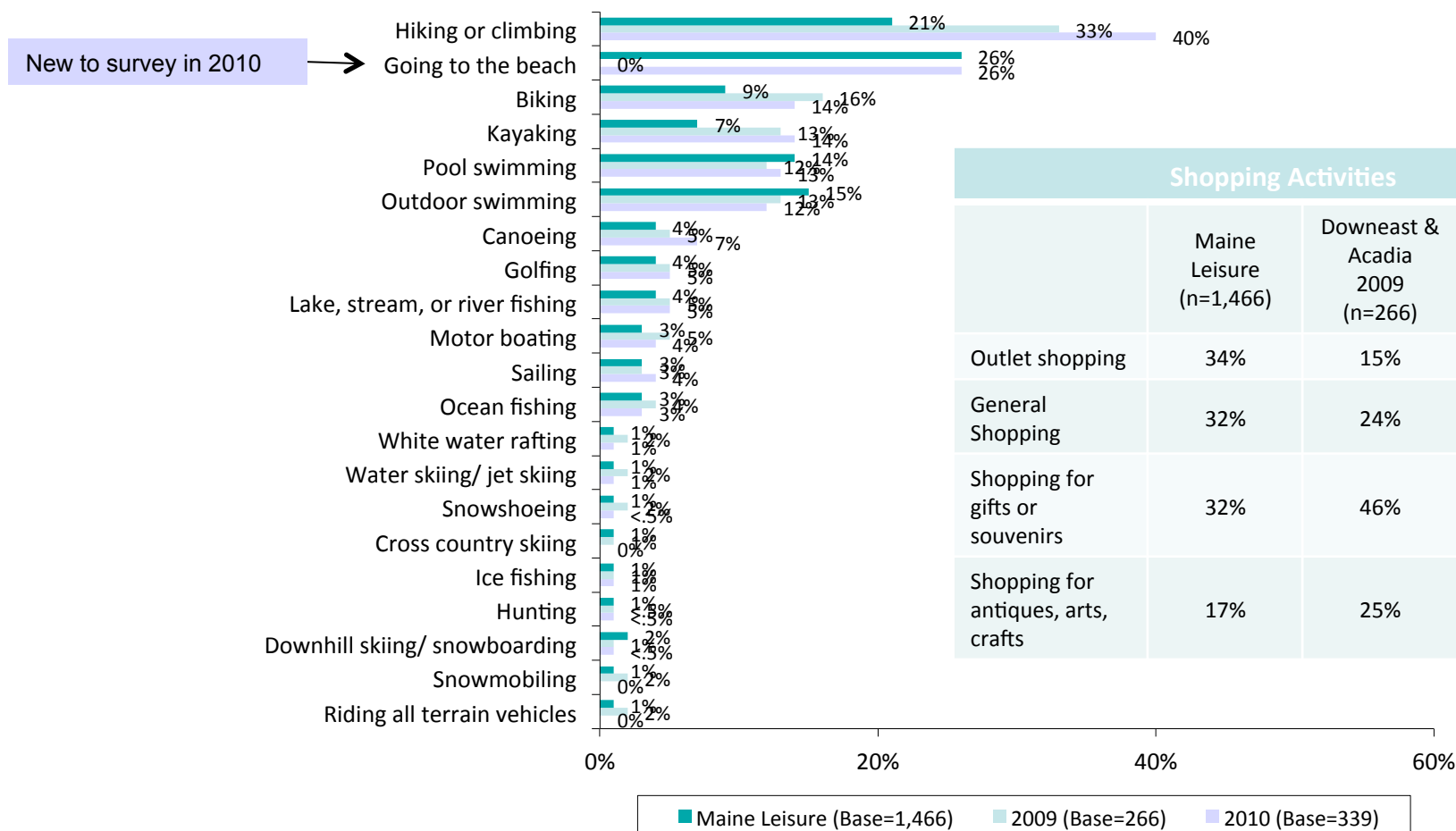
- Reflecting the wide variety of activities available in the Downeast & Acadia region, at least half of overnight leisure visitors to this region reported that they did at least one of the following during their visit: outdoor recreation, sightseeing, shopping, resting, and driving for pleasure. Notably, sightseeing is up for the region over a year ago.



Overnight Leisure Trip Activities: *Downeast & Acadia*

- Two in five visitors to Downeast & Acadia go hiking during their visit to the region.
- There has been an increase in outlet shopping in 2010 compared to 2009.

Outdoor Activities

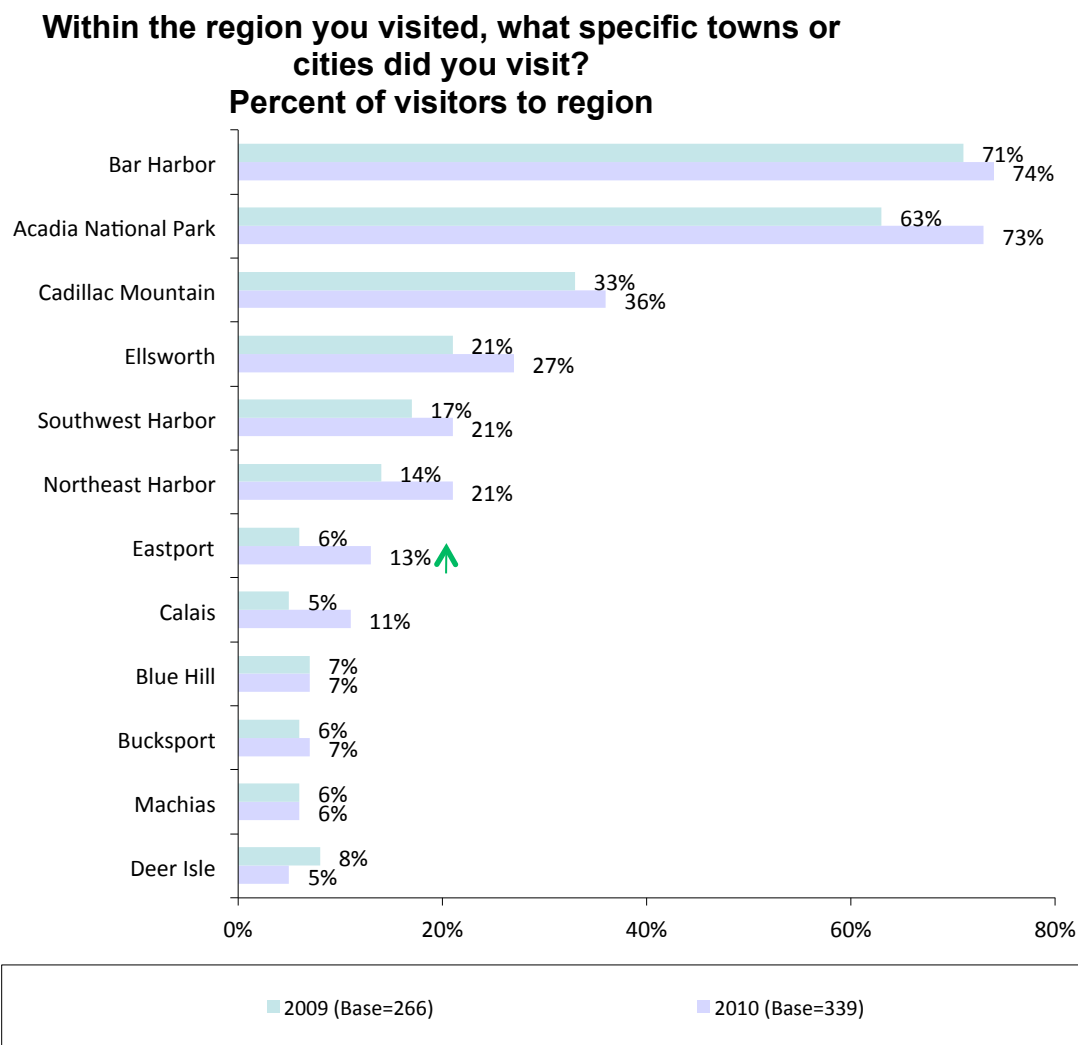


Shopping Activities

	Maine Leisure (n=1,466)	Downeast & Acadia 2009 (n=266)	Downeast & Acadia 2010 (n=339)
Outlet shopping	34%	15%	30% ↑
General Shopping	32%	24%	28%
Shopping for gifts or souvenirs	32%	46%	36%
Shopping for antiques, arts, crafts	17%	25%	21%

Overnight Leisure Visitor Towns & Cities Visited: *Downeast & Acadia*

2010 Annual Report



Day Leisure Visitor Demographics: *Downeast & Acadia*

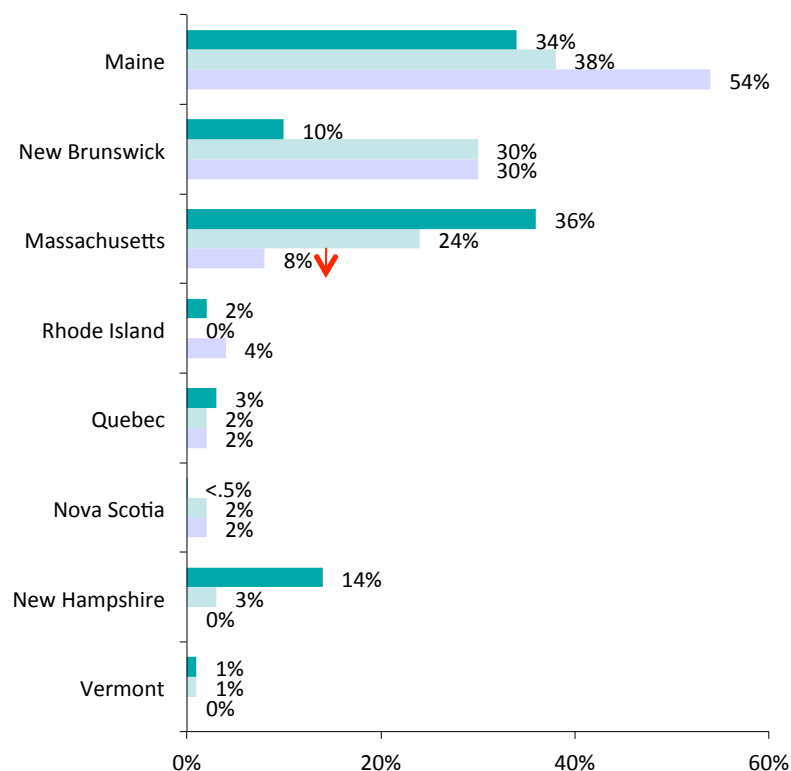
2010 Annual Report

- There is year-over-year stability in the demographic profile of leisure day visitors to the Downeast & Acadia region in 2010 as compared to the same period in 2009.

	Maine Leisure (Base=1,175)	2009 (Base=149)	2010 (Base=106)
Mean Age	46.8	44.1	46.7
< 35	27%	33%	25%
35 - 44	17%	18%	20%
45 - 54	20%	16%	23%
55 +	36%	32%	32%
Mean Income	\$92,950	\$87,710	\$76,040
< \$50,000	21%	26%	35%
\$50,000 - \$99,000	43%	43%	42%
\$100,000 +	36%	31%	23%
Female	51%	65%	52%
College Degree or Higher	73%	73%	73%
Married	62%	69%	60%
Employed Full Time	58%	67%	54%

Day Leisure Visitor Residence: Downeast & Acadia

- While Maine and New Brunswick remain the top two residences among leisure day visitors to the Downeast & Acadia region, there is a statistically significant year-over-year decrease in the percent of day visitors who ventured to the region from Massachusetts.



■ Maine Leisure (Base=1,175)

■ 2009 (Base=149)

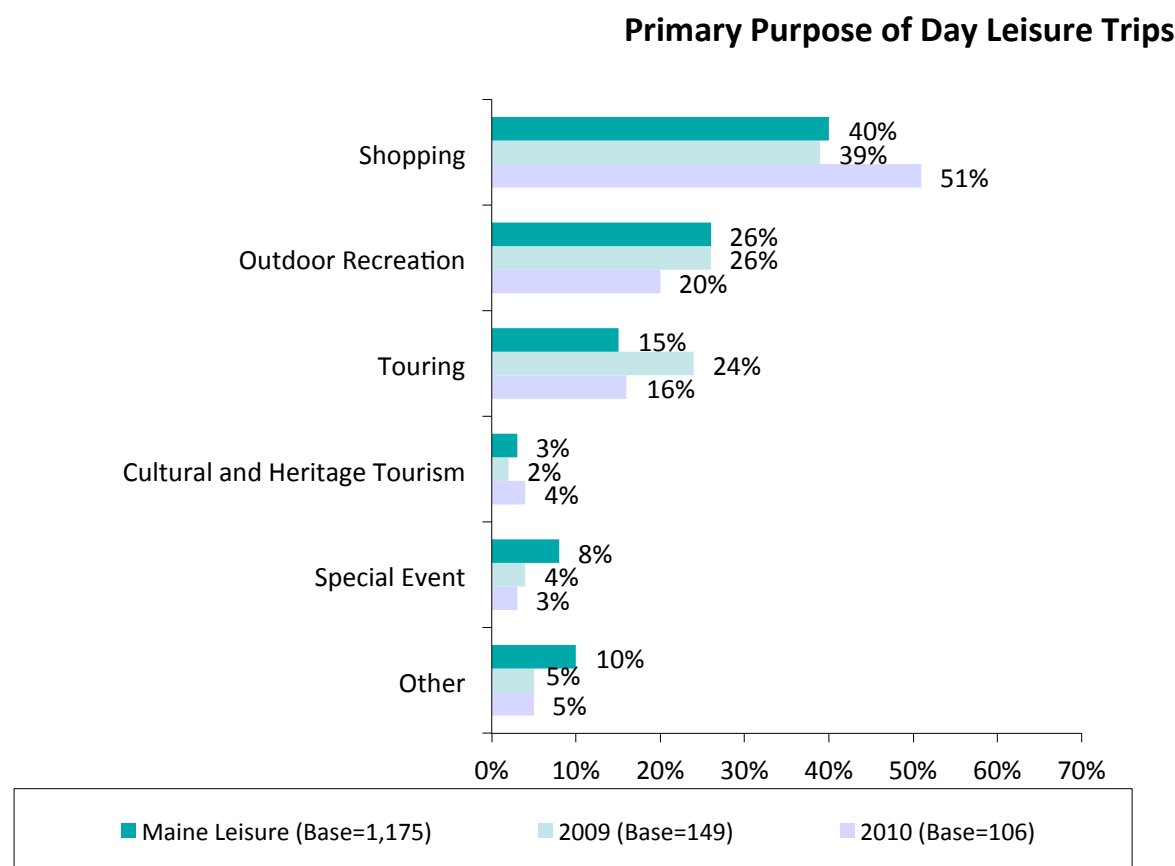
■ 2010 (Base=106)

Day Q1A. In what State or Province do you reside?

↑↓ notes significant year-over-year difference at 95% confidence level

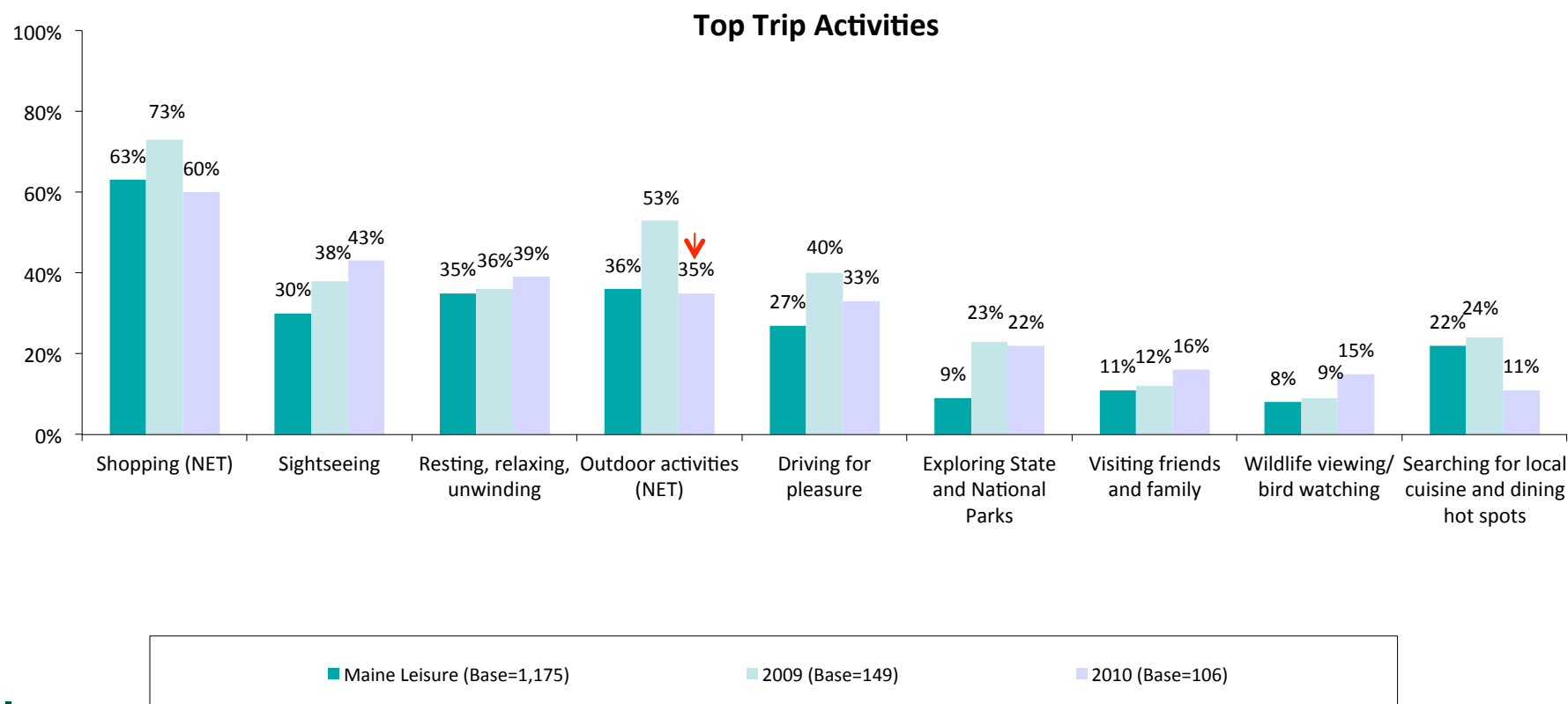
Primary Purpose of Day Leisure Trips: Downeast & Acadia

- Shopping was cited by about half of leisure day visitors as a primary purpose for visiting Downeast & Acadia, while outdoor recreation and touring were all cited by nearly one in five.



Day Leisure Trip Activities: Downeast & Acadia

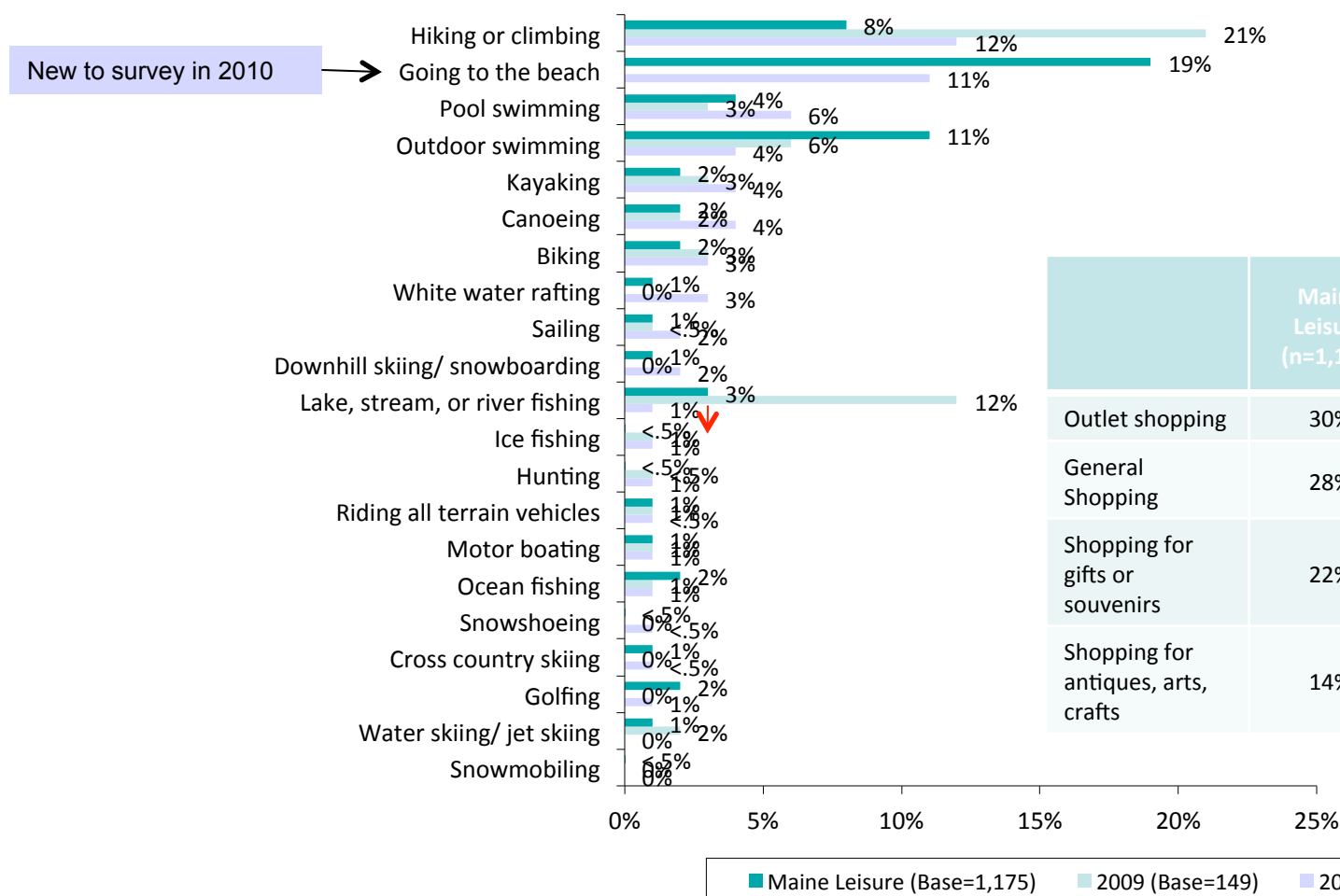
- Shopping and sightseeing were the two most widely cited trip activities among leisure day visitors to this region.



Day Leisure Trip Activities: *Downeast & Acadia*

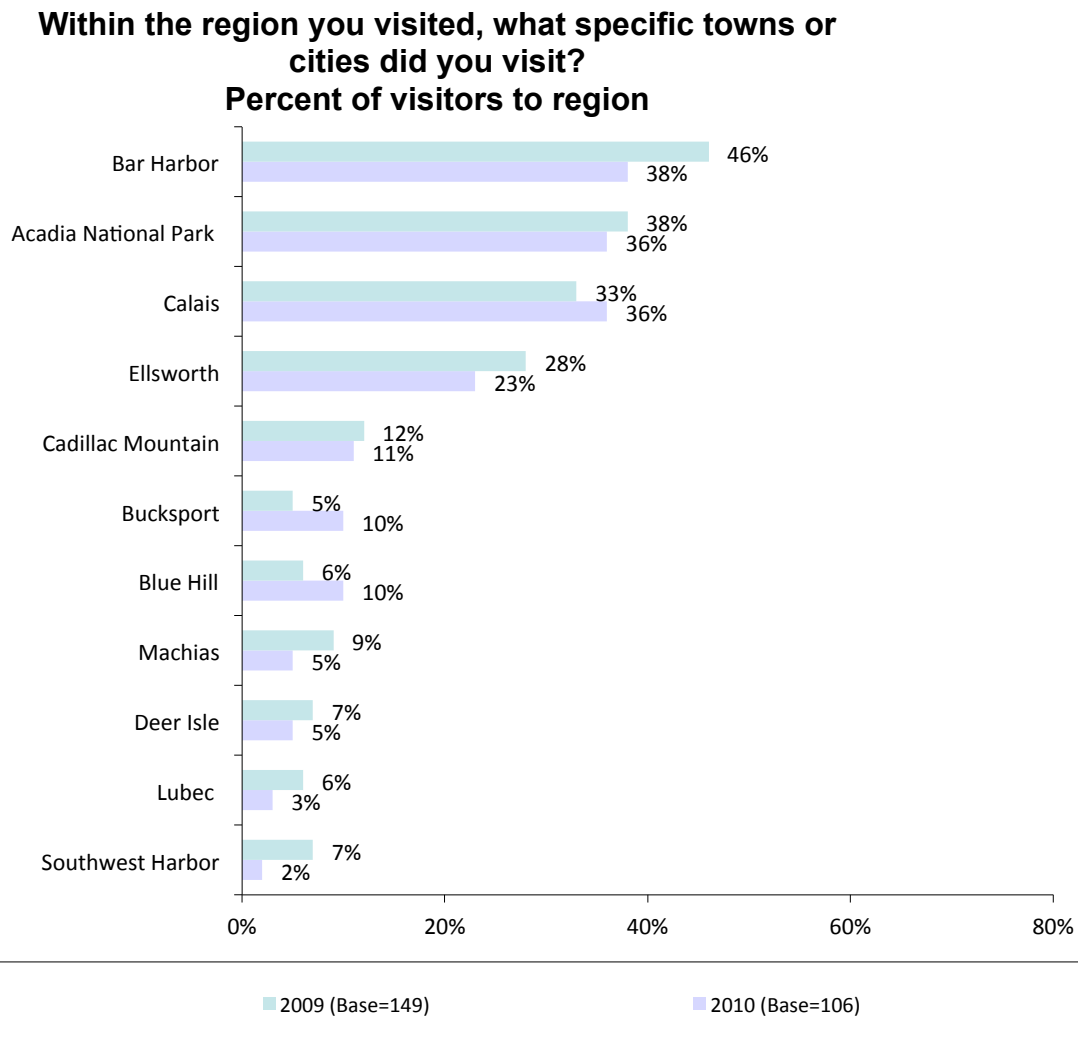
- Day visitors to Downeast & Acadia in 2010 were less likely than in 2009 to shop for gifts or souvenirs or shop for antiques and crafts.
- There is also a year-over-year decline in lake, stream or river fishing in the region among day trippers.

Outdoor Activities



	Maine Leisure (n=1,175)	Downeast/ Acadia 2009 (n=149)	Downeast/ Acadia 2010 (n=106)
Outlet shopping	30%	23%	16%
General Shopping	28%	30%	35%
Shopping for gifts or souvenirs	22%	37%	18% ↓
Shopping for antiques, arts, crafts	14%	21%	6% ↓

Day Leisure Visitor Towns & Cities Visited: 2010 Annual Report Downeast & Acadia



Regional Insights: Aroostook County



Please note: Due to the relatively small sample size for Aroostook for each individual year, the data in the following slides represents NET 2008-2010 data.

Overnight Leisure Visitor Demographics: *2010 Annual Report*

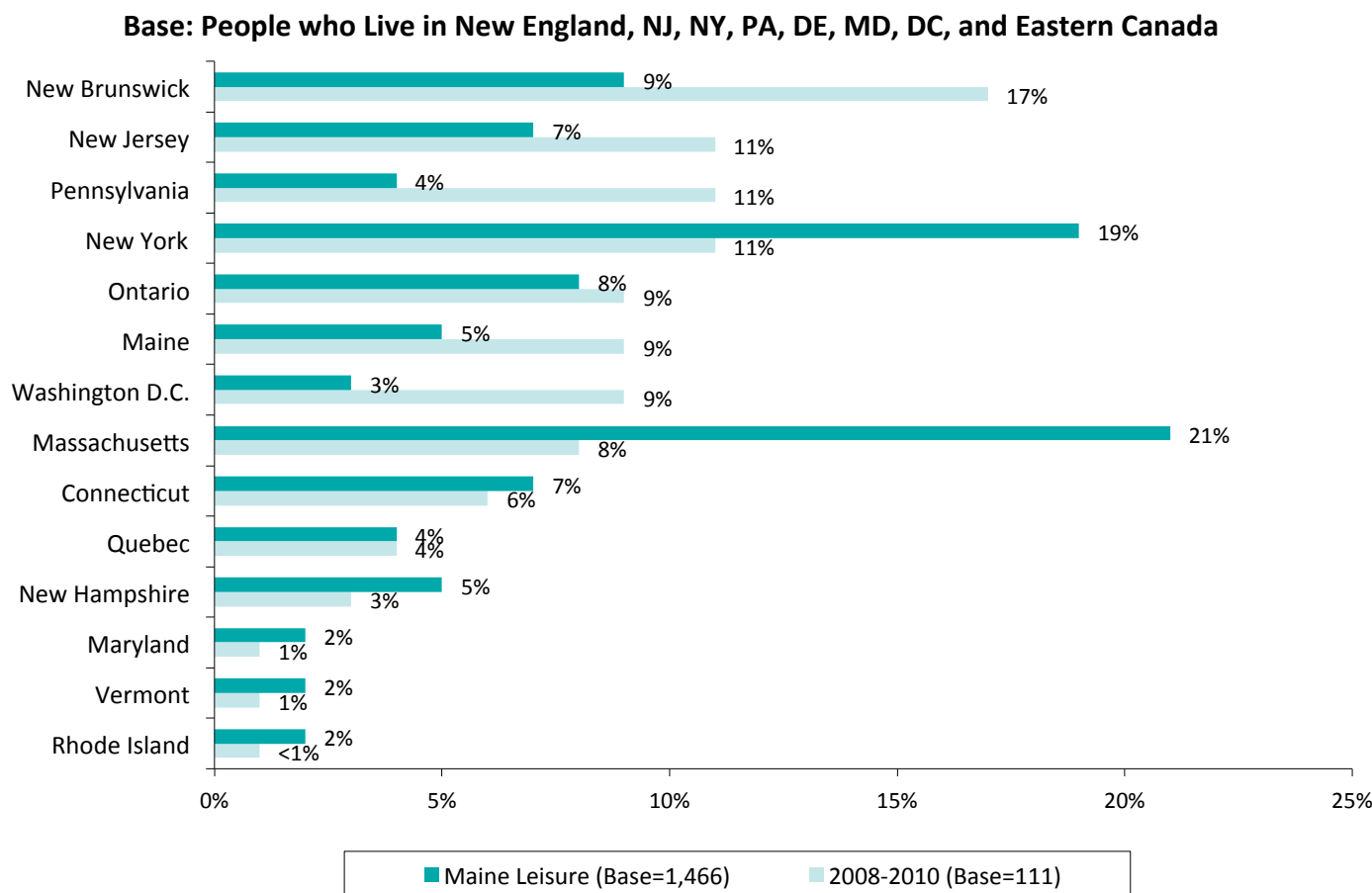
Aroostook County

- Overnight leisure visitors to Aroostook County are on average relatively young and somewhat less affluent than the typical overnight leisure visitors to Maine.

	Maine Leisure (Base=1,466)	2008-2010 (Base=111)
Mean Age	45.2	37.7
< 35	28%	43%
35 – 44	19%	25%
45 - 54	24%	16%
55 +	30%	15%
Mean Income	\$106,700	\$95,450
< \$50,000	11%	14%
\$50,000 - \$99,000	37%	47%
\$100,000 +	36%	35%
Female	47%	36%
College Degree or Higher	76%	63%
Married	61%	45%
Employed Full Time	60%	73%

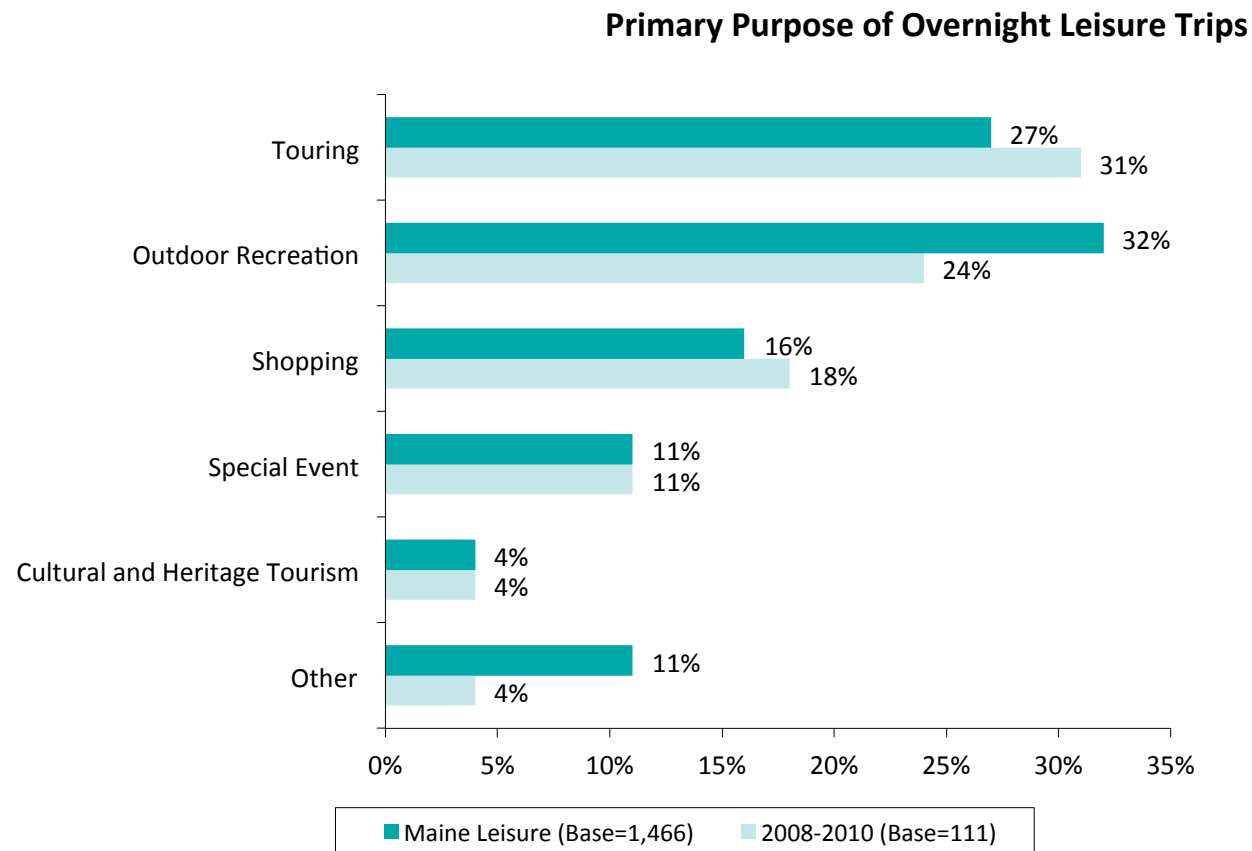
Overnight Leisure Visitor Residence: Aroostook County

- Nearly one-fifth of overnight leisure visitors to Aroostook County are from New Brunswick, followed by New Jersey, Pennsylvania, and New York.



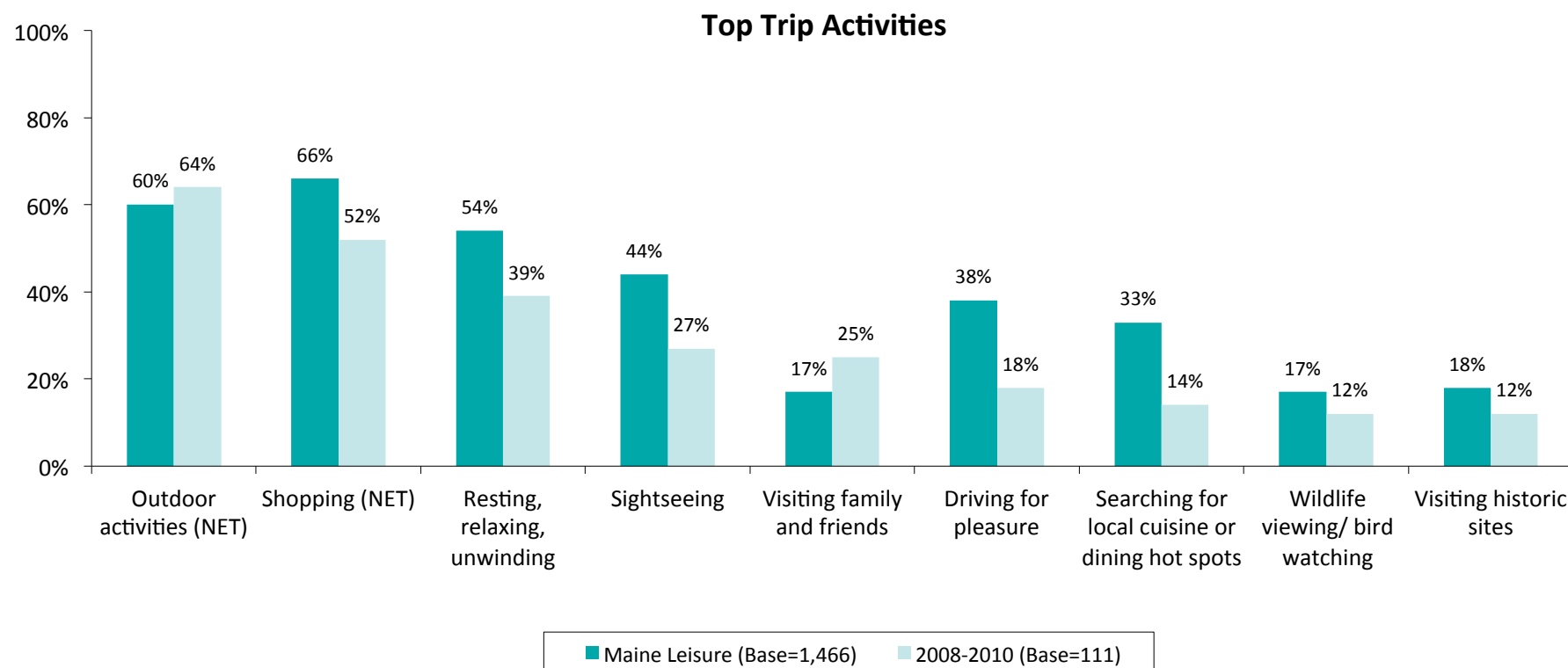
Primary Purpose of Overnight Leisure Trips: Aroostook County

- Approximately one-third of overnight leisure visitors to Aroostook County reported that touring was the primary purpose of their trip to the region.



Overnight Leisure Trip Activities: Aroostook County

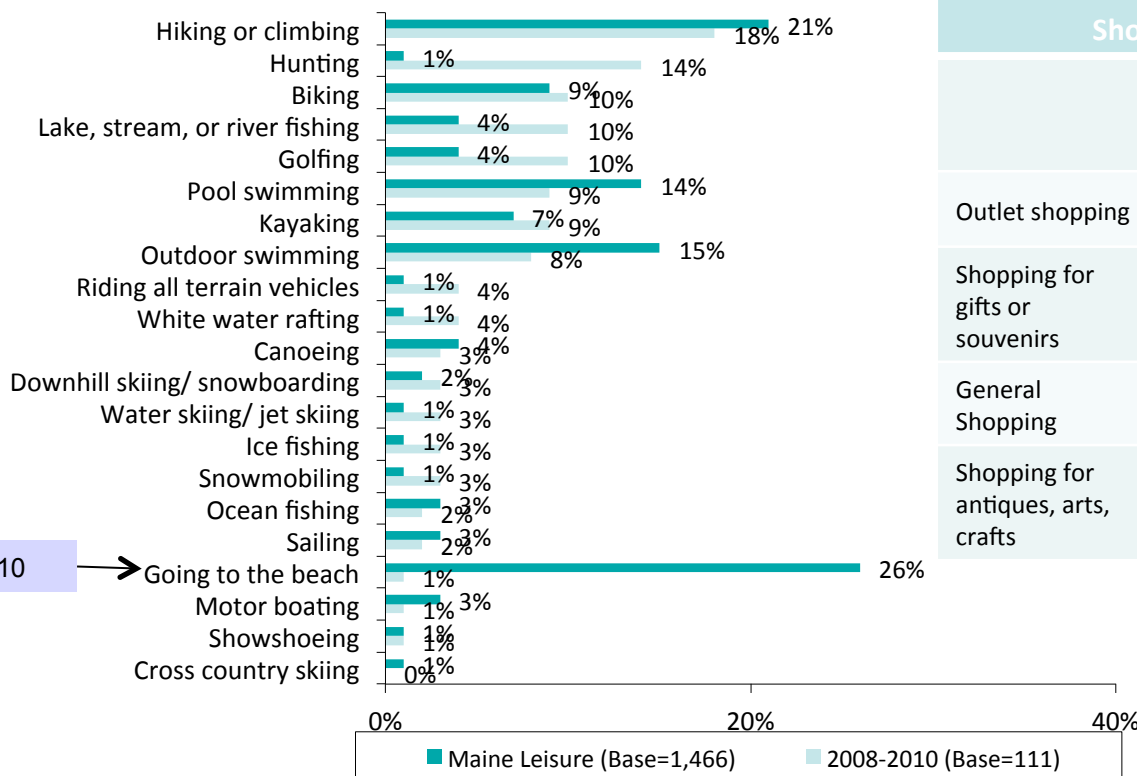
- Outdoor recreation and shopping were each cited as trip activities by more than half of overnight leisure visitors to Aroostook County. These two activities were followed by resting/relaxing, sightseeing, and visiting family and friends.



Overnight Leisure Trip Activities: Aroostook County

- Overnight visitors to Aroostook county engaged in a variety of outdoor activities, led by *hiking or climbing, lake stream or river fishing, biking, golfing, and hunting.*

Outdoor Activities

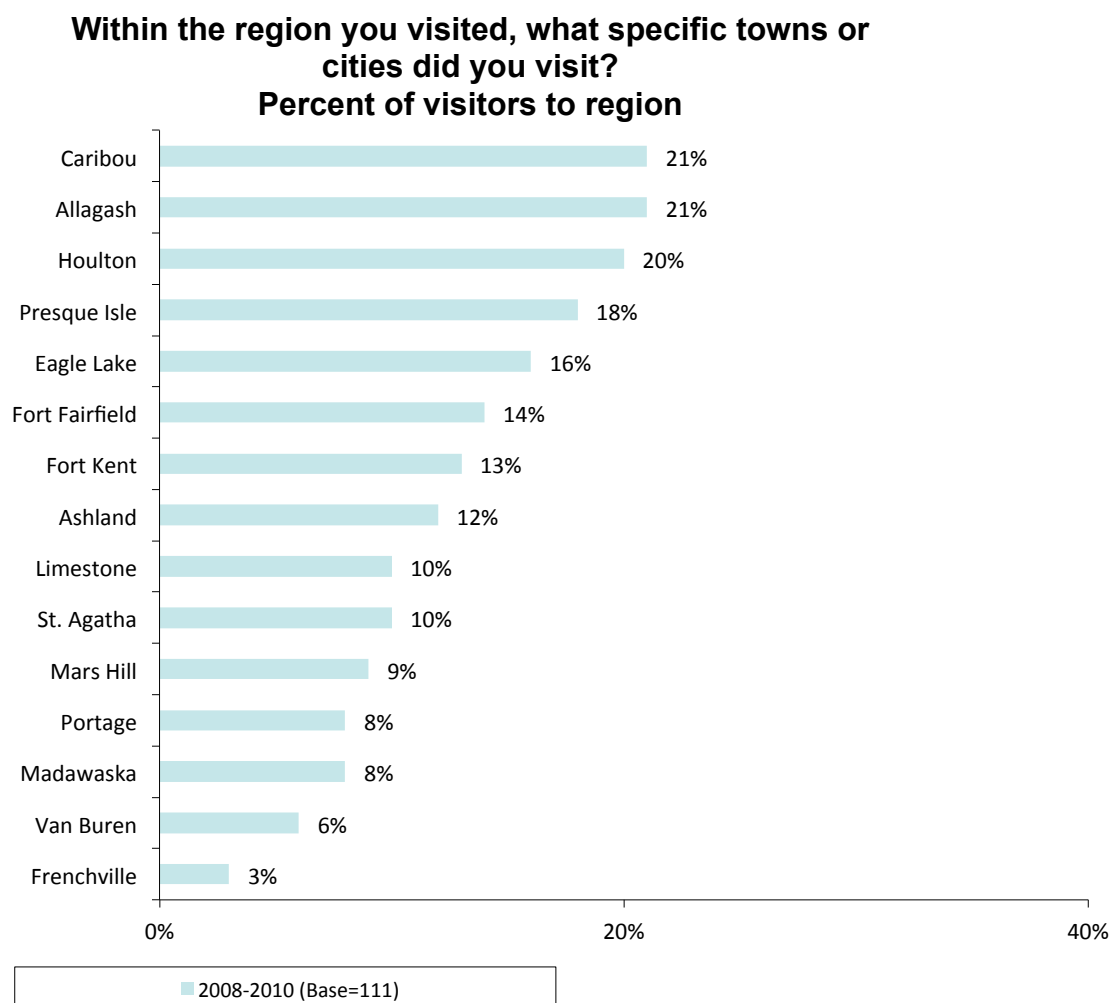


Shopping Activities

	Maine Leisure (n=1,466)	Aroostook 2008-2010 (n=111)
Outlet shopping	34%	20%
Shopping for gifts or souvenirs	32%	19%
General Shopping	32%	15%
Shopping for antiques, arts, crafts	17%	13%

Overnight Leisure Visitor Towns & Cities Visited: *Aroostook County*

2010 Annual Report



Day Leisure Visitor Demographics: *Aroostook County*

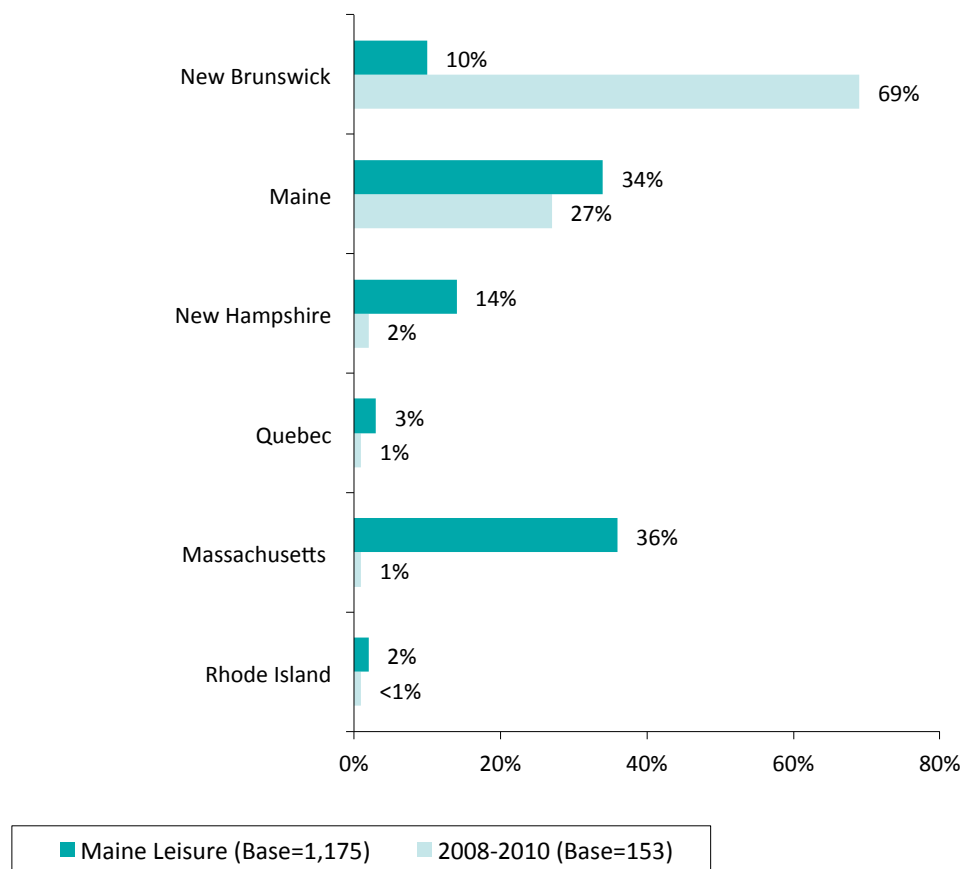
2010 Annual Report

- Day leisure visitors to Aroostook County are slightly older and more likely to be married compared to overnight visitors to this region.

	Maine Leisure (Base=1,175)	2008-2010 (Base=153)
Mean Age	46.8	47.3
< 35	27%	19%
35 - 44	17%	13%
45 - 54	20%	33%
55 +	36%	33%
Mean Income	\$92,950	\$94,730
< \$50,000	21%	16%
\$50,000 - \$99,000	43%	47%
\$100,000 +	36%	37%
Female	51%	52%
College Degree or Higher	73%	67%
Married	62%	75%
Employed Full Time	58%	

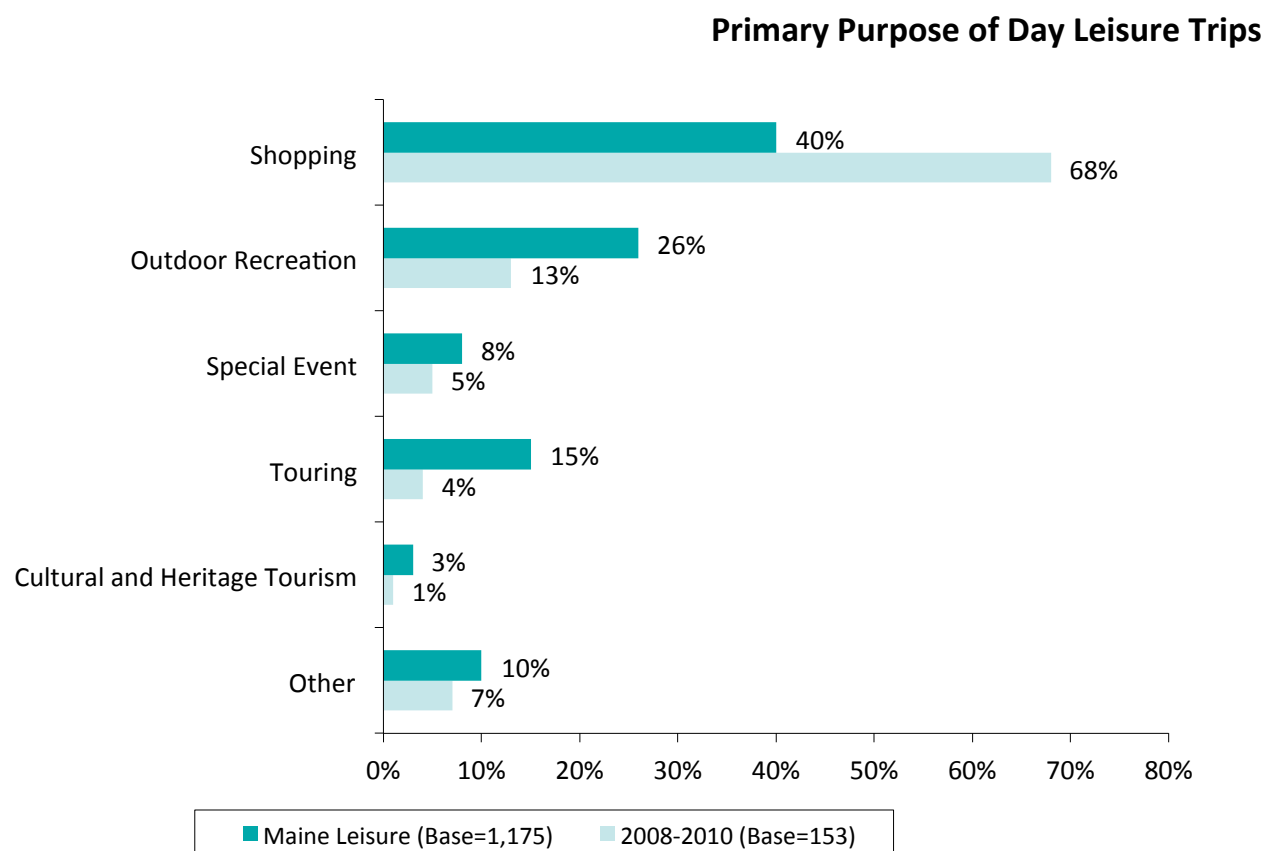
Day Leisure Visitor Residence: Aroostook County

- Over two-thirds of leisure day visitors to Aroostook County are from New Brunswick, making this Province by far the largest source of leisure day visitors to this region. Visitors from Maine account for approximately one-quarter of leisure day visitors to the region. Combined, New Brunswick and Maine make up more than 95% of leisure day visitors to the region.



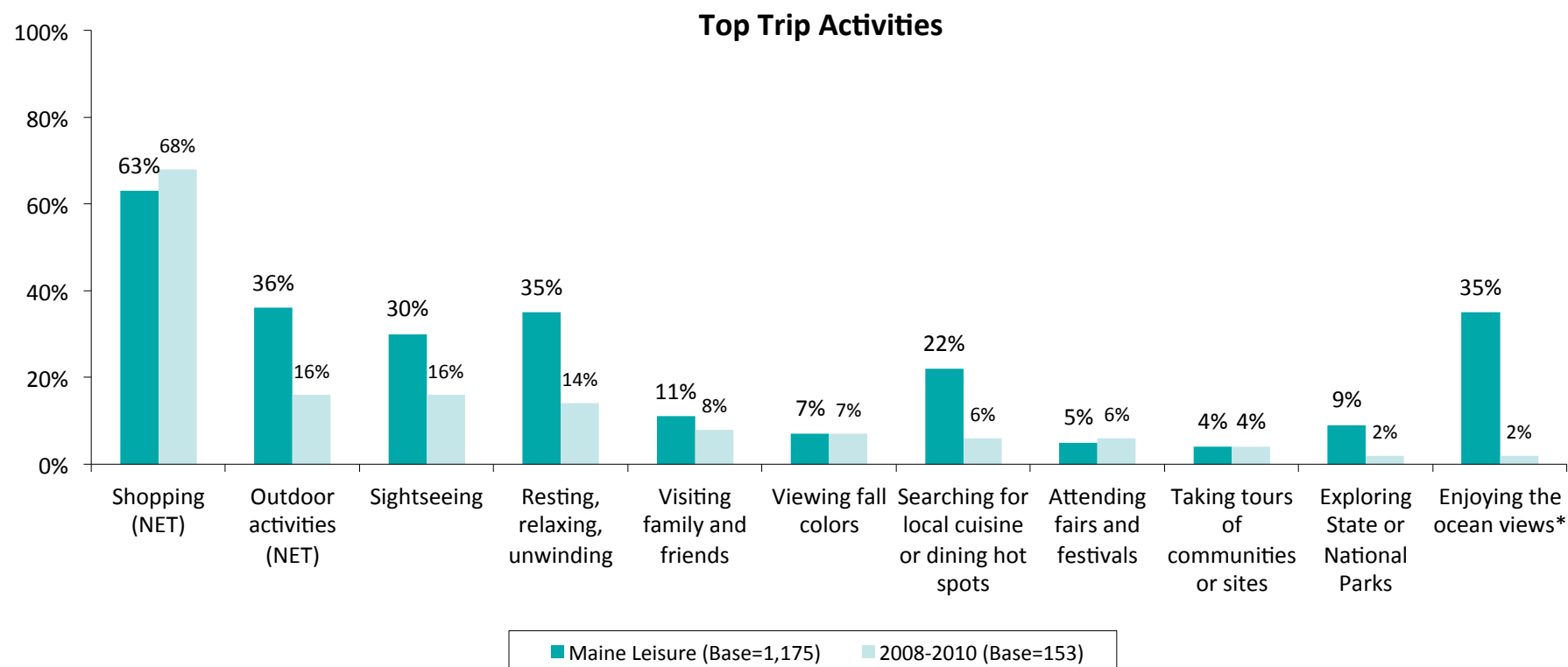
Primary Purpose of Day Leisure Trips: Aroostook County

- Shopping is the most common primary trip purpose among leisure day visitors to Aroostook County. This is attributable to the large percentage of visitors from New Brunswick as well as visitors from other areas of Maine who take advantage of shopping opportunities available in Aroostook.



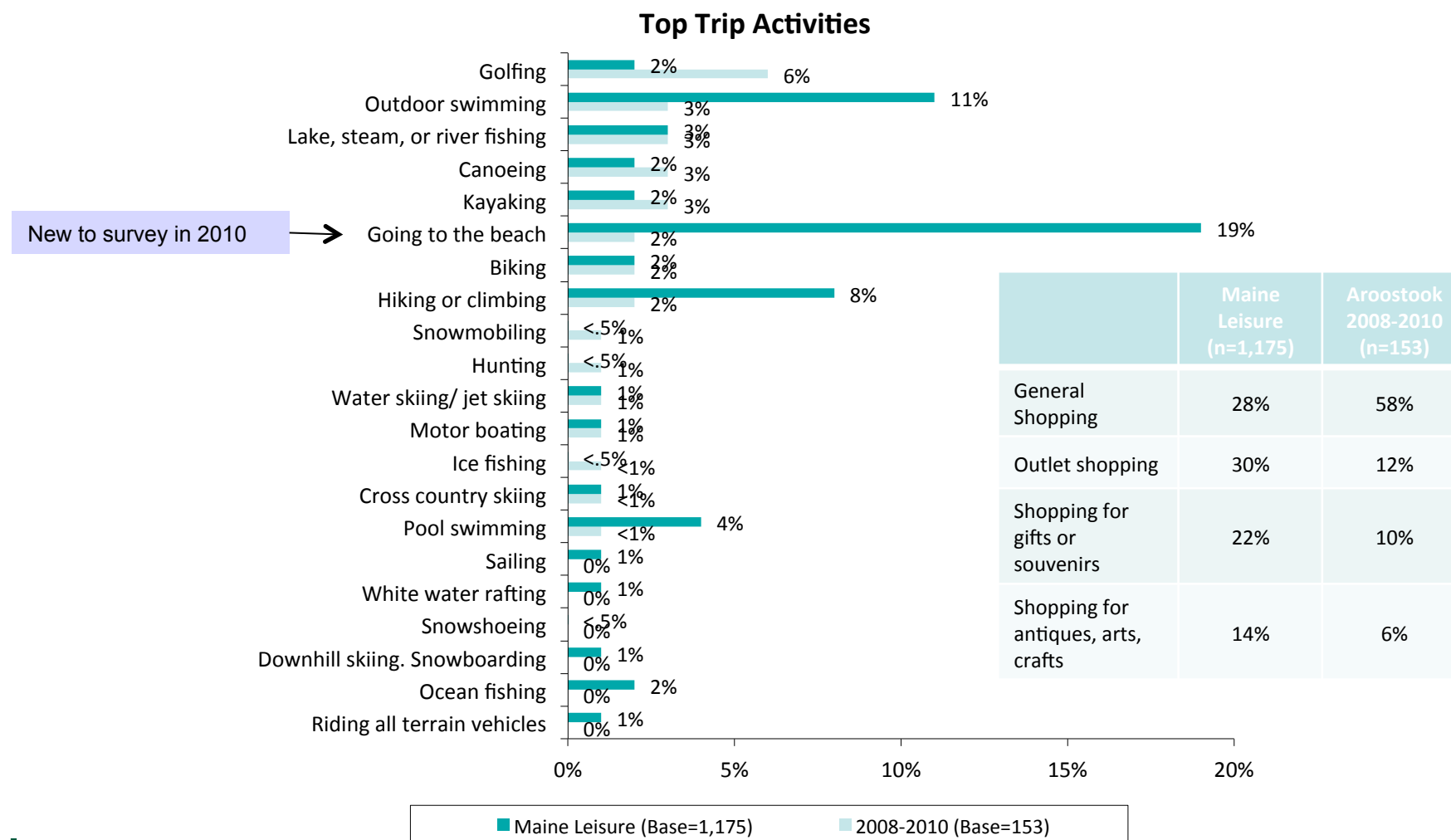
Day Leisure Trip Activities: Aroostook County

- Shopping was the trip activity cited by the largest percentage of leisure day visitors to Aroostook County.

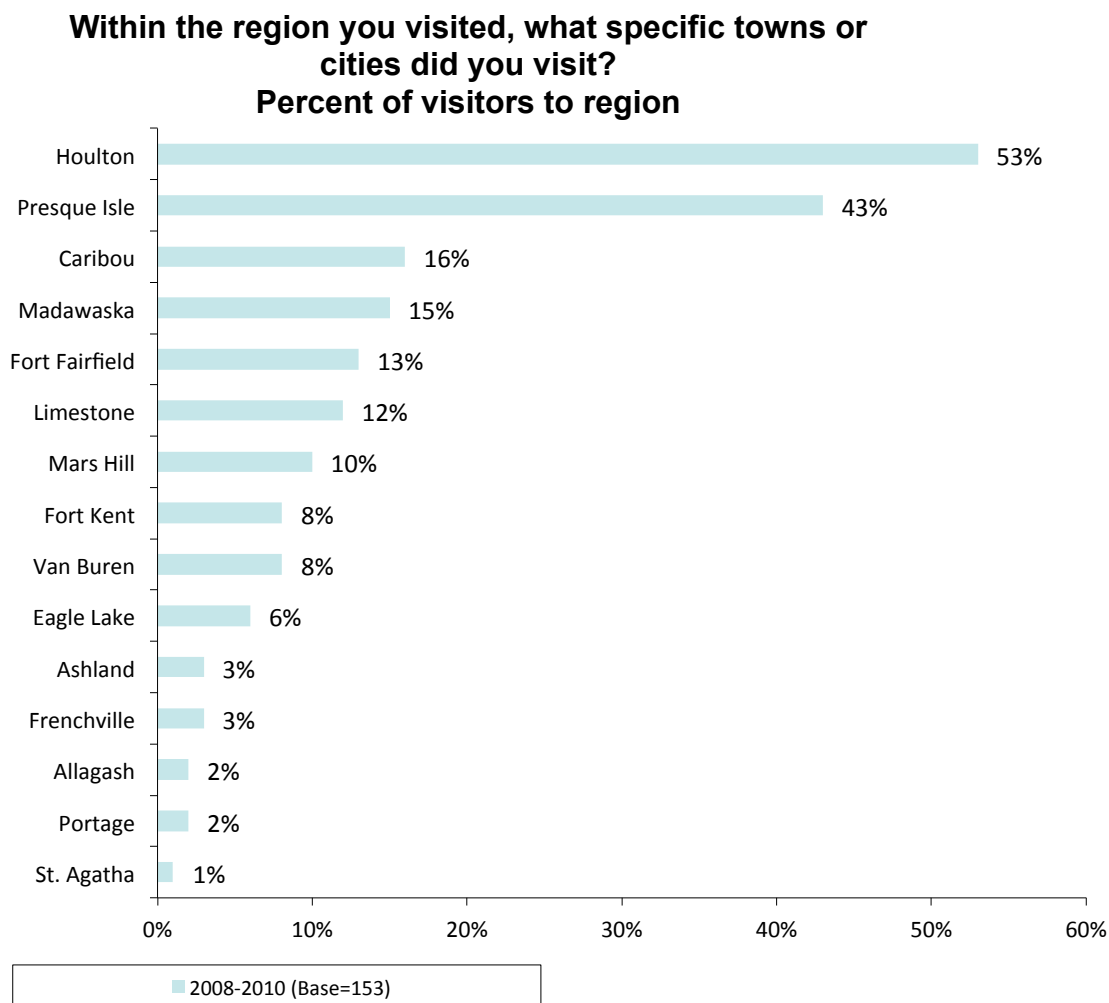


Day Leisure Trip Activities: *Aroostook County*

- Day visitors to Aroostook engaging in outdoor activities were likely to golf, swim, fish, canoe, or kayak.



Day Leisure Visitor Towns & Cities Visited: 2010 Annual Report *Aroostook County*



Year-Over-Year Sample Sizes (N)

	2008	2009	2010
Overnight Visitors:			
Net	3,320	3,057	2,992
Leisure	1,683	1,480	1,466
Business	473	495	510
VFR	1,164	1,082	1,016
Day Visitors:			
Net	1,890	1,945	1,796
Leisure	1,290	1,282	1,175
Business	149	144	141
VFR	451	518	480



DPA
201 Lafayette Center
Kennebunk, ME 04043
207.985.1790
www.digitalresearch.com

